TransportMAX™
your first and last stop

Transit Agency Buyer User's Guide

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TABLE OF CONTENTS

CHAPTER 1: GETTING STARTED WITH TRANSPORTMAX 3

What can I do on TransportMAX? 3
Accessing and logging into TransportMAX: 3
What should I do first? 3
How do I pay for my purchases on TransportMAX? 4
How do I navigate around TransportMAX? 4
What are "Learn More" links? 5
What are "Time Savings Tips"? 5

CHAPTER 2: USER REGISTRATION 6

How do I register as a TransportMAX user? 6
What personal information must I provide as a TransportMAX user? 7
How can I find out if my company is registered on TransportMAX? 8
How does the TransportMAX approval process work? 8
What are TransportMAX Job Functions? 9
What are the tasks of each TransportMAX Job Function? 9

CHAPTER 3: SHOPPING ON TRANSPORTMAX 12

Starting the Shopping Process 12
Searching for Items 12
Placing an Order 18
Order Follow-Up 25
Order Approval 33
How do I customize purchase orders? 35

CHAPTER 4: CREATING NEGOTIATIONS 36

Getting Started with Negotiations 36
Creating RFQs 38
Monitoring RFQs 72
Awarding Business in Negotiations 78

CHAPTER 5: GENERATING REPORTS 86

Introduction to Marketplace Intelligence 86
Types of Buyers Reports 88

CHAPTER 6: MY EXCHANGE FUNCTIONS 96

Managing My To Do List 96
Viewing Order Status 97
My Profile and Address Book 98

CHAPTER 7: FREQUENTLY ASKED QUESTIONS 101

CHAPTER 1: GETTING STARTED WITH TRANSPORTMAX

What can I do on TransportMAX?

TransportMAX enables you to leverage the power of the Internet to fulfill your procurement and supply chain needs.

The deep functionality of TransportMAX is arranged in several categories, such as:

- **Company and User Registration and Profiling**
  TransportMAX automates and streamlines the registration process at both the company and the user level.

- **Catalog Purchases**
  TransportMAX users can browse online catalogs and make spot purchases of goods and services.

- **Buyer RFQs and Requests for Quotation**
  TransportMAX participants can conduct a variety of transactions that range from complex RFQs for configured production goods or high velocity, repetitive purchases of frequently used items.

- **Catalog Management**
  TransportMAX supports a unified catalog that allows catalog content to be aggregated from multiple suppliers into a single catalog. Suppliers can load their catalog content **once** to reach the entire buying community.

For details about the range of TransportMAX services and functions, please review the information at TransportMAX's home page: **http://www.transportmax.com**.

Accessing and logging into TransportMAX:

To access TransportMax as a registered user, follow these steps:

- Using an Internet browser, such as Netscape or Internet Explorer, go the following URL: **http://www.transportmax.com**

- Click on the arrows >> next to the text: "Already a TransportMAX member? Log in to access the TransportMAX marketplace". This will take you to the TransportMAX Marketplace Page.

- Login to TransportMAX using the username and password created during user registration. Click "Go".

- You are now logged into TransportMAX and ready to use the system.

What should I do first?

If you are new to TransportMAX, Welcome! After registering as a TransportMAX user for your company, your TransportMAX Company Administrator will receive a notification from TransportMAX to approve your registration and assign Job Functions to you. When the Company Administrator has completed this process, you can perform the Job Functions that have been assigned to you.

For more information about exchange Job Functions, see "What are TransportMAX Job Functions?" and "How do I get a Job Function assigned to me?"

Once your Job Functions have been assigned, you can begin working on TransportMAX.

- To shop for goods or services, click the "Buying" link on the TransportMAX home page, then the "Shopping" tab.

- To create a buyer's request for quotation (RFQ), click the "Buying" link on the TransportMAX home page, then the "Negotiations" tab.

- To access your company transactions and billing information, click on the "Company Admin" link, then the "Billing" tab. (Note: You will only see these links if your Job Functions include TransportMAX Company Administrator or Buyer).

After you have registered on TransportMAX, you can also edit your personal information and add addresses to your Personal Address Book. Click on the "My Exchange" icon, then click on "Edit Personal Information" or "Address Book" in the Navigation Bar on the left side of the page. For more detailed information on the My Exchange functions, see the chapter on "My Exchange".

How do I pay for my purchases on TransportMAX?

During the online procurement process in TransportMAX, you will need to enter payment information when you proceed to "Shopping Cart Checkout" for your purchases. You will be prompted to enter the following payment information on the **Shopping Cart Checkout - Enter Order Information** page:

- **Payment Method**
  Your payment options are: American Express, Cash on Delivery, Diner's Club, Discover, Invoice, MasterCard, Visa, or Other (if "Other," enter accompanying payment notes in the Notes section). If you elect to pay by credit card, you are required to enter the credit card number, the name on the card, and the card expiration date.

- **Payment Terms**
  Payment terms specify the provisions of payment for goods or services purchased.

- **Billing Address**
  Select the billing address to which your bill for this purchase should be sent.

How do I navigate around TransportMAX?

TransportMAX is designed with simplicity, ease-of-use, and efficiency in mind. If you're new to the Internet, you'll learn to navigate the layout of the TransportMAX system in no time at all.

The TransportMAX website layout is composed of eight major features: tabs, task bar actions, buttons, links, navigation bars, data fields, drop-down menu options, and icons. Read on for more information about each of these features.

Tabs
Tabs are an important design feature in TransportMAX. Tabs are located near the top of many pages on TransportMAX. For example, you might see tabs that look something like this:

Tabs allow you access to most of the major TransportMAX functions. A tab in TransportMAX is much like the tab on the top of a file folder: when you want to view the contents of a folder, you simply click on the appropriate tab (just as you would pull a file folder out of a filing cabinet to view that folder's contents). The "active" tab (the one that represents the contents you are viewing on your screen) appears in front of the other tabs and is darker in color, while the "inactive" tabs are horizontally aligned behind the active tab and lighter in color. To make an inactive tab active, simply click on the inactive tab of your choice at any time.

What are "Learn More" links?

At select locations in TransportMAX, you will see a link to "Learn More" about a particular topic or function. The "Learn More" link will direct you to the Help content that is specific to the topic or function from which you have linked.

What are "Time Savings Tips"?

At select locations in TransportMAX, you will see boxes with information for: "Time Saving Tips". These tips provide links to online help sections pertaining to common questions and helpful information on becoming more efficient while using TransportMAX.

CHAPTER 2: USER REGISTRATION

How do I register as a TransportMAX user?

To register as a TransportMAX user, your company must first be registered with TransportMAX. If you're not sure whether your company is registered on TransportMAX, see "How can I find out if my company is registered on TransportMAX?", or simply complete steps 1 - 4 below.

Follow the steps below to register as a TransportMAX user:

1. On the **TransportMAX** home page, click the "Sign me up" link on the left side of the page.

2. On the **Before You Register** page, select the radio button next to "I think my company is already registered, and I want to register myself as a user." Click the "Proceed to Registration" button.

3. On the **Find Your Company** page, enter your company's name in the "Company Name" search field and click the "Go" button.

4. Your company's name will be listed in the "Search Results" field. Select the radio button next to your company's name, then click the "Next" button.

    - If your company is not listed in the "Search Results," check the spelling of your company name and try searching again.

    - If you are unable to locate your company name, your company is most likely not registered on TransportMAX.

5. On the **Personal Information** page, enter your user information in the appropriate fields. Required fields are marked by an asterisk (*). For a list of the information that you must provide to register as a TransportMAX user, see "What personal information must I provide as a TransportMAX user?" When you have finished entering your personal information, click the "Next" button.

6. Read the TransportMAX Legal Agreement. If you want to receive an e-mail notification whenever TransportMAX amends the agreement, click the "Send notification" checkbox in the bottom left section of the page. Click the "Next" button.

7. Review your registration information. If you need to make changes to your personal information, use your browser's "Back" button. When you are satisfied with your registration information, click the "Submit" button.

8. You will see the **Registration Confirmation** page. Your registration will be forwarded to your TransportMAX Company Administrator for approval. You will be notified of your approval status via email.

What personal information must I provide as a TransportMAX user?

When you register as a TransportMAX user, you will have the opportunity to provide all of the following personal information. Note that some information is required, while other information is optional. Required fields are marked by an asterisk (*):

- Contact Title (Dr., Miss, Mr., Mrs., Ms., Sir)
- ***Your First Name
- Your Middle Name
- *Your Last Name
- Your Title
- Your Company Name (company name will default into the Company Name field)
- Your Company Address (company address will default into the Company Address field)
- *Address Nickname (enter a short reference name - such as "My Office" or "Home Address" - that applies to the address information you will input into the five fields that follow the "Address Nickname" field)
    - *Country (of the "Address Nickname" location)
    - *Address (of the "Address Nickname" location)
    - *City or Municipality (of the "Address Nickname" location)
    - *State or Province or Region (of the "Address Nickname" location)
    - *Zip Code or Postal Code (of the "Address Nickname" location)
- *Your Phone/Extension
- Your Fax Number
- *Your E-mail Address
- *Your Username (for example, jsmith - at least 4 characters, with no spaces). Your username can only contain letters and numbers; no punctuation marks (such as !, ?, #) are allowed.
- *Your Password. Your password can only contain letters and numbers; no punctuation marks (such as !, ?, #) are allowed.
- *Retype Password

- *Challenge Question. At least 3 characters long. This is the question you would like asked in order to identify yourself in the event that you forget your password.
- *Challenge Response. At least 3 characters long, and no more than 30 characters. This is the response to the challenge question.

How can I find out if my company is registered on TransportMAX?

To determine whether your company is registered on TransportMAX:

1. From the TransportMAX Marketplace Home Page, click the "Sign me up" link on the left side of the page.
2. On the **Before You Register** page, select the radio button next to "I think my company is already registered, and I want to register myself as a user." Click the "Proceed to Registration" button.
3. On the **Find Your Company** page, enter your company's name in the "Company Name" search field and click the "Go" button.
4. If your company is registered on TransportMAX, your company's name will be listed in the "Search Results" field.
    - If your company is not listed in the "Search Results," check the spelling of your company name and try searching again.
    - If you are unable to locate your company name, your company is likely not registered on TransportMAX.

How does the TransportMAX approval process work?

Each application for registration is carefully checked for authenticity, accuracy, and completeness. Your registration is reviewed by the TransportMAX Operations team if you register as an independent entity, and by the TransportMAX Company Administrator if you register as an affiliate or user of a company that is already registered with TransportMAX. TransportMAX may contact you if questions arise during the approval of your company's registration. TransportMAX will notify you of your registration status when the approval process is complete.

The information below describes the TransportMAX approval process, once you have registered as a user.

When you register as a user of a company, the legal agreement has already been reviewed and accepted by your company, so your registration approval process is as follows:

- *Begin registration.*
  Begin registering as a user of a company by selecting the company you want to register with and entering your user information.
- *Read the legal agreement.*
  Read the legal agreement agreed upon between TransportMAX and your company, and submit your registration.

- *Wait for approval.*
  The TransportMAX Company Administrator of your company reviews your registration request for authenticity, accuracy, and completeness. The Company Administrator may contact you if questions arise about your registration.

- *Receive notification of approval or rejection.*
  When your TransportMAX Company Administrator approves or rejects your registration request, TransportMAX sends you an automated e-mail notifying you of the decision. You can check your registration status by clicking the "check your registration status" link in the **Registration** page in the "Welcome" tab. If your request is rejected, the Company Administrator will provide a reason.

- *Begin business on TransportMAX.*
  As part of the approval process, your TransportMAX Company Administrator chooses which job functions are assigned to you. Job functions control who has access to certain tabs, pages, and links in TransportMAX. To check your assigned job functions, click the "My Exchange" tab, then click "Edit Personal Information." Scroll to the "Job Function" section of the **Edit Personal Information** page.

What are TransportMAX Job Functions?

A **Job Function** is defined by a group of Exchange tasks that users can perform on TransportMAX. While an *Exchange task* is a specific action that users can perform, a *Job Function* is a collection of several Exchange tasks. The following list represents the Job Functions available for each user in TransportMAX:

- Requestor
- Approver
- Default User
- Buyer/Senior Buyer
- Procurement Director
- TA (Transit Agency) Administrator

A TransportMAX user must be assigned at least one Job Function in order to work on TransportMAX.

All TransportMAX Job Functions are assigned by the TransportMAX Company Administrator. For more information about TransportMAX Job Function assignments, see "How do I get a Job Function assigned to me?"

What are the tasks of each TransportMAX Job Function?

An **Exchange task** is a specific action that users can perform on TransportMAX. The following are examples of Exchange tasks:

- Search and review all catalog items on TransportMAX
- View and update Trading Partner Preferences for the user's own company

Several related Exchange tasks can be grouped together to form a Job Function. TransportMAX users can be assigned Job Functions that determine the tasks they can perform on TransportMAX. All TransportMAX users must be assigned at least one Job Function in order to work on TransportMAX. Exchange tasks are predetermined in TransportMAX and cannot be edited. However, your TransportMAX Company Administrator can create new Job Functions by deciding which Exchange tasks should be grouped together to form a Job Function.

The following list below details the Job Functions created by the TransportMAX Operator, which are used to assign responsibilities to each TransportMAX user. Job Functions are assigned and updated by the Company Administrator.

Default User: Every user on TransportMAX should have the Default User Job Function. This job function consists of the following tasks:

- Access To Do List in My Exchange
- Access the Trading Partner Directory
- Get Password Assistance
- Access the Log On Page
- Access to registration
- View the About Page
- Search and review all catalog items
- View the company's profile in My Exchange
- View the Home Page
- Access to the My Exchange tab
- View the Welcome tab
- View and update personal information
- View and update Personal Address Book

TA Admin: This Job Function is assigned to person or persons designated as Company Administrator.

- Approve and maintain registration of users in the company or affiliates and assign job functions.
- Perform administrative setup tasks for affiliate companies.
- Access the bulk loading functionality to upload users.
- Manage public/private negotiation templates for company.
- View the Admin tab and all associated tasks within it.
- View billing activity incurred on TransportMAX.
- View and update profile information for company and affiliates.
- View and update user profile information for all company and affiliate users.
- View and update order approval controls.
- View and update Company Address Book.
- View and update data mapping settings.
- View and update currency exchange rates.
- View and update payment method for the user's company.
- View and update trading partner keywords.
- View and update transaction delivery settings.

Requestor: This Job Function is assigned to all users who will be making purchases using the online catalog. The specific tasks of this function are listed below:

- Create an order for items selected from the catalog.
- View reports for buying activity performed by the company.
- View orders, order details and order history.

Approver: This Job Function is assigned to all users who have the authority to approve purchase orders. The specific tasks of this function are listed below:

- Approve or reject order cancellation requests.
- Can make an award decision for negotiations created by the company.
- Track orders and order status.
- Generate intelligence reports for buying activity on TransportMAX.
- Access Buying application
- View details of negotiations created by the company.
- Access the negotiations tab.

Buyer & Senior Buyer: These Job Functions are assigned to all buyers of the company:

- Cancel any negotiation or negotiation event created.
- Cancel or request order cancellation.
- Create purchase order from items selected from the catalog.
- Create negotiations and publish it to suppliers.
- View details of negotiations created by the company.
- Create reusable attribute lists.
- Generate intelligence reports for buying activity on TransportMAX.
- Create and view details of negotiation events.
- View charges of user's own activity on TransportMAX.
- View orders, order details, and order history.
- View responses for negotiations.
- View and update trading partner keywords.
- Add invitees to negotiations created by the company.
- Setup and maintain rules relating to the notification of negotiation awards.
- Approve or reject order cancellation requests.
- Make an award decision for any negotiation created by the company.
- Shorten or extend the close date for any negotiation created by the users' company.
- Unlock any sealed negotiations created.
- Unseal any sealed negotiation created.
- Add company specific headings and information to TransportMAX purchase orders.

Procurement Director: This Job Function is assigned to the Procurement Director/Manager of the company.

- All tasks of the Buyer and Senior Buyer
- Setup pricing approval rules for pricing changes submitted by suppliers.
- Approve or reject pricing changes submitted by suppliers.

CHAPTER 3: SHOPPING ON TRANSPORTMAX

Starting the Shopping Process

To access the catalog shopping process in TransportMAX, you must be logged into the system. Click the "Buying" link on the left-hand side of the screen found under "Applications" on the TransportMAX Home Page. This will take you to the Marketplace Buying Page. You will access this link to execute any procurement transaction, either by catalog or RFQ.

Searching for Items

How do I search for items to procure on TransportMAX?

At several locations throughout TransportMAX, you will have an opportunity to perform searches to locate items. To save time and perform more accurate searches, use the Search Tips below. Search Tips vary depending upon the target for which you are searching. On TransportMAX, you can search for company or trading partner names, items, and categories. For more information about how the TransportMAX search engine works, read the "Search Engine Tips".

Search by Company Name (Trading Partner)

- Click on the "Trading Partner Directory" tab from the Marketplace Buying Page. Enter a keyword into the "Trading Partner Search" field and click the "Go" button. You must enter at least one character.

- To narrow your search, enter as many keywords as possible. For example, "Acme Inc" will return more specific results than "Inc."

- You can use a "wildcard," such as the percent sign (%), to take the place of missing characters in your keyword. Enter the wildcard after your search characters to see a list of all company or trading partner names that start with your search characters. For example, a search on "t%" would return "TransportMAX" and "Texaco"; a search on "tra%" would return "TransportMAX".

- You may further narrow your search by selecting a trading partner type from the drop-down menu at the "Trading Partner Type" field, and/or entering a keyword(s) into the "Trading Partner Keyword" field:

    - **Trading Partner Type**
      When registering on TransportMAX, trading partners may identify themselves with a specific trading partner type, specifically Transit Authority or Supplier. Some trading partners do not identify themselves with a specific trading partner type. If you are unsure of the trading partner type of the company for which you're searching, select the default setting "Any" at the "Trading Partner Type" field.

    - **Trading Partner Keyword(s)**
      Some trading partners on TransportMAX define their own keywords that represent their business involvement (for example, "pens paper binders" or "minority-owned"). However, note that not all trading partners define trading partner keywords.

Keyword Search (in Shopping)

- Click on the "Shopping" tab within "Marketplace Buying" and enter a keyword into the "Search" field and click the "Go" button. Your search must contain at least one character. This search is an **exact match of all words with stemming:** the search engine looks for records that exactly match all of your keyword(s). If you enter multiple keywords, each keyword must be found for the engine to determine a match. Using a technique called **stemming**, the search engine will also look for words that are *derived* from the search terms. For example, if your search phrase is "coffee maker," the stemming process will derive the stem "make" from the term "maker." The search engine will then look for all derivatives of that stem: make, making, maker, and makes. The search engine will return any record that matches all of your stem derivatives.

  Note: When you are shopping for items to purchase, you can search for items in languages other than the default language of your TransportMAX. To search for items listed in another language, select the desired language from the drop-down menu at the "Search" field.

  Note: When you are shopping for items to purchase, you can click the "Advanced Search" link to skip the "standard" search and perform an advanced search. If you want to search for items using specific attribute values, you may want to perform an advanced search.

- To narrow your search, enter as many keywords as possible that describe the item you want to find. For example, "brake pads" will return more specific and relevant results than "brake."

  The search engine will return items that contain **all** of your keywords in the item description or other searchable attributes. Alternatively, you can use one or more of the following "operators" to dictate how the search engine should use your keywords:

  - Use *quotation marks* (for example, **"white standard copy paper"**) to search on exact phrases. In this example, TransportMAX would return items that contain all of the words "white standard copy paper," in that order.

  - Use the *minus sign* (for example, **paper -white**) to exclude words from the search. In this example, TransportMAX would return items that include the word **paper**, but *exclude* the word **white**.

  - Use an *asterisk* (for example, **standard*** or **sta***) to search for items that start with your search term(s). In this example, TransportMAX would return items that start with **standard** (for example, **standardized**) or **sta** (for example, **stabilizers** and **standardized**).

  - If your initial search results are too broad, you can select the "Search within these search results" option to refine your search.

  - If your initial search returns no results, you may choose to expand your search by using one (or more) of the following options:

    - Click the "Advanced Search" link to perform a search based on item attributes.

    - Perform an Expanded Search to sort searches by relevance.

- Click the "Browse Categories" link to browse through *parent* categories (categories that contain "child" categories, or "subcategories") and *item* categories (categories that contain items).

Advanced Search (in Shopping)

- If you have specific information about the item you are looking for, use the advanced search feature to perform a search based on item attributes.

- Click the "Advanced Search" link within the Shopping tab. Enter a search term(s) or value(s) into any or all of the search fields on the **Advanced Search** page, then click the "Go" button. You may use the operators discussed above (except in the "Category" field) to dictate how the search engine should use your search terms. You do not have to enter a search term or value into every field to perform a search; however, using more fields will narrow the search results.

  The following describes some of your options on the **Advanced Search** page:

  - Item Description - You can enter item description keywords and select a language in which to search for items.

  - Supplier – Click the flashlight icon to go to the Supplier Search screen. To locate a supplier, you may either click "Go" to retrieve all suppliers in TransportMAX or enter the first few letters of the supplier if known. Click "Go" to retrieve the list. Select a supplier on the screen and return to the Advanced Search page to continue entering attributes.

  - Category - You can enter or select an item category in which to search for items. The categories used on TransportMAX are based on the UNSPSC classification code. If the category you select includes its own category attributes, these attributes will be appended to the drop-down menus at the "Attributes" fields. Click the "Refresh Attributes" button to append the category attributes.

  - Attributes - You can select up to four attributes on which to search. The attribute values available are: Supplier Item, Manufacturer, Manufacturer Item, Alias, and UNSPSC Code. Select your desired search attributes from the drop-down menu at any of the "Attributes" fields, then enter a search term or value in the corresponding "Search Value" field.

  - You can further target your search by entering additional criteria in the "Additional Search Options" section.

  - How does the search engine work within and across attributes? If you enter multiple search terms in any given attribute's "Search Value" field, the search engine will perform an "**and**" search. For example, if you enter the search terms **dark blue** into the "Search Value" field for the attribute "Item Description," the search engine will look for items that include all of the words **dark blue**, **dark**, *and* **blue** in the description.

  - If you enter search values into more than one attribute's "Search Value" field (for example, you enter search values for the following attributes: "Item Description," "Manufacturer," and "Price," and "Currency"), the search engine will perform an "**and**" search. The search engine will look for items that include *all* of your search values. For example, if you enter 1) the search terms **"laserjet printer"** for the

attribute "Item Description," 2) the search terms **"Hewlett Packard"** for the attribute "Supplier," 3) the price range **"500 to 1,000"** for the attribute "Price," and 4) the currency code "USD" for the attribute "Currency," the search engine will look only for laserjet printers that are made by Hewlett Packard and cost between $500 and $1,000. Laserjet printers that cost more than $1,000 and inkjet printers, for example, will not be returned in the search results.

- ***Exception:*** If you select to search on the same attribute in more than one "Attribute" field, the search engine will perform an "**or**" search. For example, you might select the attribute "Manufacturer" in two different "Attribute" fields. In the "Search Value" field of the first "Manufacturer" attribute, you might enter "IBM." In the "Search Value" field of the second "Manufacturer" attribute, you might enter "Dell." The search engine will look for items that are manufactured by either IBM or Dell.

Expanded Search (in Shopping)

If your standard keyword search returned no results, you can choose to perform an Expanded search using the same search criteria. In an Expanded search, the results are sorted according to relevancy, with the most relevant (closest match) results listed first. To perform an Expanded search, click the link "Suggestions on what to try next" located at the bottom of your original search results page. Click the "Go" button in the first Search Suggestion option. An expanded search is returned in which the following types of searches are performed in sequence:

- **Exact Match of All Words with Stemming**
  As in a standard keyword search, the search engine looks for records that exactly match all of your keyword(s). If you enter multiple keywords, each keyword must be found for the engine to determine a match. Using a technique called **stemming**, the search engine will also look for words that are *derived* from the search terms. For example, if your search phrase is "coffee maker," the stemming process will derive the stem "make" from the term "maker." The search engine will then look for all derivatives of that stem: make, making, maker, and makes. The search engine will return any record that matches all of your stem derivatives.

- **Partial Match of Any Words with Stemming**
  The search engine looks for records that match one or more of your keyword(s). The search engine will also use *stemming* to return, as a partial match, any record containing at least one of the search terms or stem derivatives.

- **Begins With (or Wild Card)**
  In this type of search, the search engine appends a "wild card" to the end of each keyword(s). A wild card (represented by the % sign) is a character that takes the place of missing characters in your keyword(s); for example, "lead pen" is converted to "lead% pen%" in a wild card search. In this example, the search engine would return "leaded pencils." If the search engine finds results in the "Begins With" search, the search engine will not perform the "Fuzzy Match" search.

- **Fuzzy Match**
  The search engine looks for records that closely resemble your item, but are spelled somewhat differently. For example, if your search term is "telefone," the search engine would return the fuzzy match "telephone."

What is a "restricted user" view?

Some items in the TransportMAX catalog have special prices available only to selected buyers. These **buyer prices** can only be viewed by TransportMAX users from the transit authority to which the prices are assigned.

Your TransportMAX Company Administrator may have restricted your view of catalog items to *only* those items that have buyer prices for your company. If this is the case, you will not be able to view any catalog items that do not have buyer prices for your company.

If you have questions about your restricted user status, contact your TransportMAX Company Administrator.

How do I sort my item search results?

After you locate items to purchase, you may want to sort your item results (especially if your search has returned a large number of items).

To sort your item search results:

1. Conduct an item search to locate an item.

2. On the **Search Results** or **Items In** page, choose one of the following options from the drop-down menu at the "Sort By" field:

   - **Supplier**
     The supplier name is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

   - **Description**
     The first word of each item's description is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order). **Note:** Words enclosed in quotation marks and numeric characters are listed first (ascending order) or last (descending order).

   - **Unit**
     The unit of measure code is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

   - **Price**
     The least expensive item is listed first (ascending order) or last (descending order).

   - **Currency**
     The currency code is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

   - **Category (for items located by searching the catalog)**
     The category name is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

3. To the right of the "Sort By" field, select either "Ascending" or "Descending" (see the bullets above for explanation). Click the "Go" button.

4. The items on the **Search Results** or **Items In** page will be sorted accordingly.

How do I filter my item search results?

After you locate items to purchase, you may want to filter your item results (especially if your search has returned a large number of items). Filtering your item results enables you to narrow your search by eliminating irrelevant items. Once you choose the value by which you want to filter your items, all items that do not match that value will be filtered out of your results.

To filter your item search results:

1. Conduct an item search to locate an item.

2. On the **Search Results** or **Items In** page, click the "Filter Results" link.

3. Click any blue highlighted column heading to filter your results by that heading's attribute.

4. A pop-up "Filter Results By" window will list the values you can choose to filter your results. Choose a value to **eliminate** all results that **do not** contain that value. For example, if you are filtering your results by supplier, and you only want to see items from "Acme Supplier," choose "Acme Supplier" from the list of values in the "Filter Results By" window, then click the "OK" button. All suppliers other than "Acme Supplier" will be eliminated from your results.

    - You can filter your results by several values simultaneously. For example, if you only want to see items from Acme Supplier, Smith Supplies Inc., and Bargain Supplies, you can choose all three suppliers from the list of values in the "Filter Results By" window, then click the "OK" button. .

        - To choose a range of values, hold down the "Shift" key while you click on the first and the last values in the range.

        - To select multiple values that do not appear in sequence, hold down the "Control" key while you click on all of your value selections.

    - Click the "OK" button after you have selected your values.

5. TransportMAX will filter out all results that do not match your selected value(s).

How do I compare items while shopping?

After you locate items to purchase, you may want to compare two or more items in your item search results (especially if your search has returned several similar items).

To compare two or more items:

1. Conduct an item search to locate an item.

2. On the **Search Results** or **Items In** page, select the items you want to compare by checking the appropriate box in the "Select" column. You can select up to 25 items (the maximum number of items listed on a single page) to compare.

3. Click the "Compare" button.

4. The **Compare Items** page will display a detailed comparison of the items' attributes.

5. You can choose to add any of the compared items to your shopping cart by clicking the "Add to Cart" button for the desired item. You can also choose to return to the **Search Results** by clicking the "Return to Shopping" link.

What can I do if I can't find the item I need in the TransportMAX catalog?

If you can't find the item you need in the TransportMAX catalog, consider creating an RFQ to purchase the item.

You must have the appropriate Job Function assigned to you (by your TransportMAX Company Administrator) to create an RFQ. Currently, only Buyers, Senior Buyers and Procurement Director job functions are allowed access to create negotiations.

Why doesn't an item's image display?

An item's image will not be displayed if you are trying to view the image from a secure URL using a Netscape browser. An example of a secure URL is one that starts with "https://" instead of "http://." (A supplier can specify an image URL for an item using the "Image URL" base attribute.) Your browser must also support the image format. Most Web browsers support popular image formats such as GIF and JPEG. Refer to your browser's documentation for an exact list of the image formats it supports.

Placing an Order

How do I add items to my shopping cart?

After you search the TransportMAX catalog to locate an item to purchase, you can add the item to your shopping cart for purchase.

To add an item to your shopping cart:

1. When you have found an item you want to purchase, select the item by clicking the select box to the left of the item.

2. Click the "Add to Cart" button.

3. You will link to the **Shopping Cart Contents** page. The item that you added to your shopping cart will appear on the page.

4. The default order quantity for each item is "1." To change the quantity, enter the quantity desired into the "Quantity" field, then click the "Update" link to update your purchase total price.

5. If you want to look for additional items to purchase, you can return to shopping. If you are finished shopping, you can proceed to checkout.

    - To return to shopping, click the "Return to Shopping" link.

    - To proceed to checkout, click the "Proceed to Checkout" button.

    - To delete an item from your shopping cart prior to checkout, click "Delete" to the right of the item.

Note: You can ship the same item to different addresses if necessary, and if the supplier supports this. Select and add the item once to your shopping cart, and then return to shopping and select the same item again. This gives you two entries in your shopping cart for the same item. Specify the appropriate quantity for each entry and when you continue processing your order you can specify a different address for each item.

Note: If the items in your shopping cart are supplied by different companies, TransportMAX will divide your shopping cart into a separate section for each supplier. To generate a separate order for each supplier, you are required to proceed through the checkout process for each supplier separately when purchasing items from different suppliers.

Note: If the items in your shopping cart are listed in different currencies, TransportMAX will divide your shopping cart into a separate section for each currency.

Can my shopping cart contain items from more than one supplier?

Yes. Your shopping cart can contain items from multiple suppliers. TransportMAX will create a separate purchase order for each supplier.

Can my shopping cart contain items that are priced in different currencies?

Yes. Your shopping cart can contain items priced in several different currencies. TransportMAX will create a separate purchase order for each currency, and for each supplier.

For example, you may choose to order 6 items from Acme Supplier and 4 items from Bargain Suppliers. Four of the six items from Acme Supplier are priced in USD, and the other two items are priced in GBP. In addition, two of the items from Bargain Suppliers are priced in DEM, while the other two items are priced in USD.

TransportMAX would generate **four** purchase orders for this purchase:

Purchase Order	Supplier	Currency
PO #1	Acme Supplier	USD
PO #2	Acme Supplier	GBP
PO #3	Bargain Suppliers	DEM
PO #4	Bargain Suppliers	USD

Can I order items that don't have a price?

A "To Be Determined" price typically means the supplier wants you to contact them for the exact price or to purchase the item through negotiation. Click the "Supplier Comments" link associated with the item to see if the supplier provides further information.

Although you can add "To Be Determined" priced items to your shopping cart, you cannot check out the items and complete an order for them. If your shopping cart includes "To Be Determined" priced items, do the following:

1. Complete the checkout process for the priced items in your shopping cart, if any. TransportMAX keeps "To Be Determined" priced items in your shopping cart while you complete the checkout process for the priced items.

2. After you finish the checkout process and click the "Submit" button to submit the order, click the "Return to Shopping Cart" link to return to the remaining "To Be Determined" priced items in your shopping cart.

3. For the "To Be Determined" priced items remaining in your shopping cart, begin the negotiation process by clicking the "Add to Negotiation" button on the **Shopping Cart Contents** page. See the "Negotiations" section of the Online Help for more information.

As a buyer, you or the appointed TransportMAX Procurement Director in your company can use the **Set Pricing Approval Rules** page to choose whether you want to include "To Be Determined" priced items in your pricing approvals (if you elect to approve suppliers' prices). See "How do I approve or reject pricing that a supplier created for my company?" for more information.

What order information must I provide to complete my purchase?

After you add items to your shopping cart and click the "Proceed to Checkout" button, you will have an opportunity to enter the following information on the **Enter Order Information** page. Note that some of the information is required, while other information is optional. Required information is marked with an asterisk (*):

Order Summary Information (found on the right hand side of the screen)

- **Supplier**
  The name of the supplier from whom you will purchase this order will default into this field.

- **Order Total**
  The total cost of your order will appear in this field. The order total is equal to the cost per item multiplied by the quantity ordered for all items ordered from a single supplier. The order total does not include any applicable sales or other taxes.

General Order Information

- ***Order Description**
  Enter a brief description of your order. For example, "Yearly Supply of Brake Pads".

- **Buyer Order Number**
  You can optionally include an internal order number for your reference, such as a Purchase Order number. TransportMAX will also automatically assign a TransportMAX order number to each order. However, you may use the Buyer Order Number for your internal reference purposes.

Shipping Information

- ***Need-By Date**
  Enter the date by which you need your order at your ship-to location.

- ***Ship-To Address**
  Your default ship-to location (as set in your Personal Address Book) will appear in this field. To choose another address from your Personal Address Book, or to

enter a new address, click the "Select" button. For information about shipping items to different addresses, see "Can I ship different items to different locations?"

- **Mailstop**
  If you wish to enter a specific mailstop location within the ship-to location, you may enter one here.

- **Enter Shipping By Item**
  If your order consists of multiple items from the same supplier and you wish to ship these items to separate locations, click this link to enter multiple shipping locations. This option is only available if the supplier allows multiple shipping locations.

- **Carrier**
  The carrier is the shipping company that will deliver your order. Select a carrier from the drop-down menu. If you select "Other" from the menu, enter your carrier information in the "Note to Supplier" field.

- **FOB**
  FOB (Freight on Board) determines the point at which you will take title of goods purchased. Select an FOB value from the drop-down menu. If the FOB value that you require is not in the drop-down menu, contact your Company Administrator to have the necessary value added.

- **Freight Terms**
  Freight terms specify the provisions for payment of freight. Select freight terms from the drop-down menu. If the freight term that you require is not in the drop-down menu, contact your Company Administrator to have the necessary value added.

Billing Information

- ***Payment Method**
  Select your payment method from the drop-down menu. The following are the payment method options that may appear on TransportMAX. You can choose to pay for your purchase by:

  - Credit card (American Express, Diner's Club, Discover, MasterCard, or Visa)
  - Cash on delivery (COD)
  - Invoice account
  - Other

  The payment method that TransportMAX displays by default (unless you change it) when you complete an order is one of the following:

  - The credit card information, if any, that you have defined in the **Edit Personal Information** page in "My Exchange."

- The supplier's preferred payment method if the credit card you have specified is not supported by the supplier. (The supplier can select a preferred payment method in the **Trading Partner Preferences** page in the "Company Administration" application of TransportMAX.)

- The first of the payment methods listed in the supplier's **Trading Partner Preferences** page if the supplier has no preferred payment method.

- ***Bill-To Address**
  Your default bill-to location (as set in your Personal Address Book) will appear in this field. To choose another address from your Personal Address Book, or to enter a new address, click the "Select" button.

- **Payment Terms**
  Payment terms specify the provisions of payment for goods or services purchased. Select payment terms from the drop-down menu. If the payment term that you require is not in the drop-down menu, contact your Company Administrator to have the necessary value added.

Notes and Attachments

Note to Supplier
If desired, include a text note about your order to the supplier. (For example, you could enter a note to provide special shipping or handling instructions.) If you selected "Other" in the "Carrier," "FOB," "Freight Terms," or "Payment Terms" fields above, enter the appropriate information here.

Attachments
If desired, include an attachment with your order. Attachments contain additional descriptive information. The file size limit for attachments is 4 MB. For attachment files larger than 4 MB, post the file to the Internet site of your choice, and include the URL at which the attachment can be accessed. Include the full URL, for example: http://www.transportmax.com.

Supplier Acknowledgment

Acknowledge-By Date
If you want the supplier to send you an acknowledgment of this order, enter the date by which you want to receive the supplier's acknowledgment. An order acknowledgment confirms that the supplier accepts your order and can fulfill the order by the "Need-By Date" you have specified on the **Enter Order Information** page.

If the supplier does not accept your order by your acknowledge-by date, TransportMAX will automatically cancel the order the day after your acknowledge-by date. You will be notified by email if this occurs.

If you do not specify an "Acknowledge-By Date" when entering your order information, you will assume that your order has been accepted by the supplier unless the supplier communicates otherwise.

Can I ship different items to different locations?

Often your order will consist of many different types of items. If you order multiple items, you have the option of shipping different items to different company locations. For example, assuming your order consists of 10 computer monitors and 20 printers, you can choose to ship all the monitors to one address and all the printers to a different address (this assumes, of course, that you have defined multiple company addresses). You also can specify different need-by dates and mailstops for each item.

Additionally, if you have duplicate lines in your shopping cart for the same item, you can ship each line to a different address. For example, if you need to order 10 laser printers but ship 7 to one location and the rest to a different location, you simply select and add the item to your cart twice, the first time specifying a quantity of 7 and the second time a quantity of 3. By having a separate entry in your cart for each quantity, you can ship them to different locations.

Specifying Different Ship-to Addresses and Need-By Dates
After you have selected items for your order, added them to your shopping cart and clicked the "Proceed to Checkout" button, you are located on the **Enter Order Information** page. You use this page to complete your order information by specifying the item destinations and the dates by which you need the items to arrive. If you have more than one item on your order, you can choose to have different items shipped to different locations. You can also specify a different need-by date for each item. To specify different ship-to addresses, need-by dates, and/or mailstops:

1. Click the "Enter Shipping by Item" button. The **Enter Shipping Information by Item** page appears. You need to specify a need-by date, a ship-to address for each item. You can optionally specify a mailstop for the item as well.

2. Enter the date by which you need to receive the item. TransportMAX will validate the value you enter and display it in the proper format. You must enter a date later than the current date.

3. The ship-to address defaults to your company's default address. If this address is correct, continue to Step 6.

4. If you need to select a different address, click the address book icon under the "Ship-To Address" column. The **Select Ship-To Address** page appears showing all addresses defined for your company.

5. Click the appropriate "Select" button to identify the appropriate ship-to address for this item. This returns you to the **Enter Shipping Information by Item** page.

6. If there is also a mailstop associated with this address, enter the information in the "Mailstop" data field.

7. Repeat the above five steps as necessary until you have specified the shipping information for all the items on your order.

8. When you have completed entering your shipping information, click the "OK" button. This returns you to the **Enter Order Information** page. If you need to change or review the address and need-by date information you have specified, you can click the "See items" links to go back to the **Enter Shipping Information by Item** page.

9. When you are finished specifying the remaining order information, click the "Continue" button. You are returned to the **Order Summary** page. From this page you can complete your order.

Are any transaction documents associated with my order?

After you place an order, several transaction documents will be generated by TransportMAX as follows:

- **Purchase Order - Buyer**
  After you place your order, TransportMAX will store the purchase order created on the system. You will be able to access the purchase order through "My Orders" in My Exchange.

- **Purchase Order - Seller**
  After you place your order, TransportMAX will send a notification to the supplier that an order has been placed. The purchase order is then picked up by the supplier from TransportMAX.

- **Purchase Order Acknowledgment**
  After the supplier has acknowledged your purchase order, TransportMAX forwards a purchase order acknowledgment to your company online using TransportMAX. This acknowledgement will be delivered via email.

Can I reorder items from a previous order?

You can reorder items from an order that you previously created in TransportMAX with the simple click of a "Reorder" button. Follow these steps for reordering:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Purchases" tab, then click the "View Orders" link.

3. Select the order whose items you want to reorder. You can reorder items from an order of any status, including a previously reordered order. If you already have items in your shopping cart, your reordered items will be added to it.

4. Click the "Reorder" button. (You can also select and view the details of the order first and then, from the **View Order Details** page, click the "Reorder" button.) The **Shopping Cart Contents** page appears confirming that the order has been created.

5. Click the "here" link in the confirmation page to view the copied order to see if any changes occurred to the item information since you last ordered them.

   TransportMAX copies the item and quantity for each of the items on the order exactly, but other information is taken from the latest item information in the TransportMAX catalog. That is, if a supplier changed the price, currency, unit of measure, description, or other attributes of an item since you last ordered it, your new order will include the changed information. Likewise, if the supplier deleted the item from the catalog (or recreated it under a new item number), it will not appear on your new order. If you are a buyer with "restricted pricing" access (you can view only buyer prices that the supplier created for your company), an item may no longer be available to you if the supplier removed the item from your company's price list. In this case, the item will also not appear on your new order.

6. If you wish, in the **Shopping Cart Contents** page, delete items that you don't want, change the quantity of the items, or add other items to the order by clicking the "Return to Shopping" link.

7. Click the "Proceed to Checkout" button to complete the order in the **Enter Order Information** page.

   None of the information on the **Enter Order Information** page is carried over from the original order except the Ship-to Address and Bill-to Address. If you changed your default ship-to or bill-to address on the original order, this changed address is carried over to your new order.

8. Click "Continue," review the order, and click the "Submit" button to submit the order.

Order Follow-Up

Will buyers receive any notifications about their orders?

After placing an order, a buyer may receive the following notifications (as applicable) via e-mail. These same notifications are also visible when the buyer clicks the "My Exchange" icon at the top of the page, then clicks the "Manage My List" link:

- **Your TransportMAX order [Number] has been [Approved/Rejected]**
  This notification lets the buyer know whether the order has been approved by the final approver or rejected by an approver. If the order has been approved, TransportMAX also already sent the order automatically to the supplier. To see approver notes such as a rejection reason, if the approver provided any, access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link), click the "Purchases" tab, then click the "View Orders" link. Choose the "View Details" button for that order and click the "View Action History" link.

- **Your TransportMAX order [Number] has been placed**
  If a buyer's order did not need to be approved, TransportMAX sends a notification to the buyer confirming that the order has been sent to the supplier.

- **Acknowledgment for your TransportMAX order [Number] is past due**
  If the buyer specifies an "Acknowledge-By Date" when entering order information, TransportMAX sends this notification on the acknowledge-by date if the supplier has not responded to the order by the acknowledge-by date. This notification reminds the buyer that TransportMAX will automatically cancel the order if the supplier does not respond by the end of the acknowledge-by date.

- **Your TransportMAX order [Number] has been [Accepted/Rejected]**
  TransportMAX sends this notification to let the buyer know whether the supplier has accepted or rejected the order. To see supplier notes such as a rejection reason, if any, access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link), click the "Purchases" tab, then click the "View Orders" link. Choose the "View Details" button for that order and click the "View Action History" link.

- **Your TransportMAX order [Number] has been canceled**
  If the buyer specifies an "Acknowledge-By Date" when entering order information, and the supplier with whom the buyer has placed the order fails to acknowledge the order by the acknowledge-by date, TransportMAX will automatically cancel the order the day after the acknowledge-by date. If this occurs, TransportMAX will send this notification to the buyer to communicate the order cancellation. This notification is also sent if the buyer's approvers did not approve or reject the order by the day before the buyer's acknowledge-by date or, if the buyer

gave no acknowledge-by date, by the earliest need-by date. (You can specify different need-by dates for different items on an order; in this case, TransportMAX uses the earliest of those need-by dates.)

- **Your cancellation request for TransportMAX order [Number] has been forwarded to [Supplier Name]**
  This notification is sent when a buyer clicks the "Cancel" button for a "New" or "Accepted" order. (If the buyer did not specify an "Acknowledge-By Date" when entering order information, the order status is "New." If the supplier already accepted the order, the order status is "Accepted.") A buyer's cancellation request of a "New" or "Accepted" order requires the supplier's approval. TransportMAX sends this notification to let the buyer know that the cancellation request has been submitted to the supplier. Until the supplier responds, the order status is "Pending Cancel." For more information, see "How does a buyer cancel an order, and what happens?"

- **Your request to cancel TransportMAX order [Number] has been [Accepted/Rejected]**
  When the supplier responds to a cancellation request by a buyer, TransportMAX sends this notification to let the buyer know whether the supplier accepted or rejected the request. If the supplier accepts the cancellation, the status of the order changes to "Cancelled." If the supplier rejects the cancellation, the order reverts to its original status of "New" or "Accepted. For more information, see "How does a buyer cancel an order, and what happens?"

Once you receive items on your order, you can indicate to the supplier that you have received them. (You must receive against the entire order, not individual items.)

How can I view my order status?

Follow the directions below to view your order status:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link). Click the "Purchases" tab, then the "View Orders" link.

2. From the drop-down menu at the "View" field, select which orders you want to view and click the "Go" button. As a buyer, you can view the "Last 25 Orders," "All My Orders," "Orders Requiring Acknowledgment," or "Orders to Receive."

3. Your orders will be listed on the **Orders** page. To sort your orders, select a sorting criterion from the drop-down menu at the "Sort by" field, then click the "Go" button. You can sort your orders by any one of the following criteria:

   - **Order Description**
     The first word of each order's description is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

   - **Order**
     The order numbers are listed in descending or ascending order.

   - **Order Date**
     The order dates are listed in descending or ascending order.

   - **Supplier**
     The supplier name is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

- **Currency**
  The currency code is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

- **Order Total**
  The total cost of each order is listed in descending or ascending order.

- **Status**
  Orders requiring acknowledgment will be listed first (ascending order) or last (descending order).

- **Acknowledge-By**
  The acknowledge-by dates are listed with the date closest to today's date first (ascending order) or the date furthest from today's date first (descending order).
  Note: Orders that do not require acknowledgment will be listed first (descending order) or last (ascending order).

4. To the right of the "Sort by" field, select either "Ascending" or "Descending" (see the bullets above for explanation). Click the "Go" button. Your orders will be sorted accordingly.

5. The "Status" column in the "Orders" table will indicate the status of each of your orders.

   - **Pending**
     TransportMAX has received a buyer's order, but the order requires additional approval from people in the buyer's company.

   - **Acknowledgment Required**
     The buyer has asked the supplier to acknowledge the order (with acceptance or rejection of the order), and the supplier has not yet responded.

   - **Rejected By Approver**
     The approver (or one of the approvers) in the buyer's company has rejected the order. See "How does the approval process work?" An approver can provide a reason for the rejection. The reason, if any, is visible in the "View Action History" link when you click the "View Order Details" button for the order.

   - **New**
     TransportMAX has sent the order to the supplier. The buyer did not require acknowledgment. All approvers in the buyer's company have approved the order, if approval was needed. Or, if additional approval was not needed, TransportMAX sent the order to the supplier right after the buyer created it. Approver comments, if any, are visible in the "View Action History" link when you click the "View Order Details" button for the order.

   - **Rejected**
     The supplier has rejected the order. The supplier can provide a reason for the rejection. The reason, if any, is visible in the "View Action History" link when you click the "View Order Details" button for the order.

- **Accepted**
  The supplier has accepted the order. The supplier can provide notes to the buyer when accepting an order. These notes, if any, are visible in the "View Action History" link when you click the "View Order Details" button for the order.

- **Received**
  The buyer has acknowledged receipt of the items on the order. For more information, see "How does a buyer receive an order?"

- **Pending Cancel**
  When a buyer clicks the "Cancel" button for an order with a status of "New" or "Accepted," the cancellation request is sent to the supplier for approval. Until the supplier responds, the status is "Pending Cancel." Buyer comments, if any, are visible in the "View Action History" link when you click the "View Order Details" button for the order. For more information, see "How does a buyer cancel an order, and what happens?"

- **Cancelled**
  When a buyer cancels an order with a status of "Pending" or "Acknowledgment Required," the order status changes to "Cancelled." If the buyer requests cancellation of an order with a status of "New" or "Accepted," the status changes to "Pending Cancel" while awaiting the supplier's response; then the order status changes to "Cancelled" if the supplier accepts the cancellation. Buyer and supplier comments, if any, are visible in the "View Action History" link when you click the "View Order Details" button for the order.

How can I view my order details?

Follow the directions below to view your order details:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link). Click the "Purchases" tab, then the "View Orders" link.

2. From the drop-down menu at the "View" field, select the orders to view and click the "Go" button. As a buyer, you can view the "Last 25 Orders," "All My Orders," "Orders Requiring Acknowledgment," or "Orders to Receive."

3. Your orders will be listed on the **Orders** page. To sort your orders, select a sorting criterion from the drop-down menu at the "Sort by" field, then click the "Go" button. You can sort your orders by any one of the following criteria:

   - **Order Description**
     The first word of each order's description is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

   - **Order**
     The order numbers are listed in descending or ascending order.

   - **Order Date**
     The order dates are listed in descending or ascending order.

- **Supplier**
  The supplier name is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

- **Currency**
  The currency code is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

- **Order Total**
  The total cost of each order is listed in descending or ascending order.

- **Status**
  Orders requiring acknowledgment will be listed first (ascending order) or last (descending order).

- **Acknowledge-By**
  The acknowledge-by dates are listed with the date closest to today's date first (ascending order) or the date furthest from today's date first (descending order). Note: Orders that do not require acknowledgment will be listed first (descending order) or last (ascending order).

4. To the right of the "Sort by" field, select either "Ascending" or "Descending" (see the bullets above for explanation). Click the "Go" button. Your orders will be sorted accordingly.

5. Select the radio button to the left of the order for which you want to view details. Click the "View Details" button. The details of your order, including shipping and billing information, will be displayed on the **View Order Details** page.

6. Click the "View Action History" link to view the actions (with associated dates and times) taken on this order.

How can I view my order history?

Follow the directions below to view the history of all your orders or to view the history of a particular order. You can also view your order status and order details, as described above.

To view the history of all your orders:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link). Click the "Purchases" tab, then the "View Orders" link.

2. From the drop-down menu at the "View" field, select which orders you want to view and click the "Go" button. As a buyer, you can view the "Last 25 Orders," "All My Orders," "Orders Requiring Acknowledgment," or "Orders to Receive."

3. Your orders will be listed on the **Orders** page. To sort your orders, select a sorting criterion from the drop-down menu at the "Sort by" field, then click the "Go" button. You can sort your orders by any one of the following criteria:

- **Order Description**
  The first word of each order's description is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

- **Order**
  The order numbers are listed in descending or ascending order.

- **Order Date**
  The order dates are listed in descending or ascending order.

- **Supplier**
  The supplier name is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

- **Currency**
  The currency code is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

- **Order Total**
  The total cost of each order is listed in descending or ascending order.

- **Status**
  Orders requiring acknowledgment will be listed first (ascending order) or last (descending order).

- **Acknowledge-By**
  The acknowledge-by dates are listed with the date closest to today's date first (ascending order) or the date furthest from today's date first (descending order). Note: Orders that do not require acknowledgment will be listed first (descending order) or last (ascending order).

4. To the right of the "Sort by" field, select either "Ascending" or "Descending" (see the bullets above for explanation). Click the "Go" button.

5. Your history of orders will be sorted and listed accordingly.

6. To view the history of a particular order:

   - Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link). Click the "Purchases" tab, then the "View Orders" link.

   - Select the order whose history you want to review and click the "View Details" button.

   - In the **View Order Details** page, click the "View Action History" link. You can see all the actions taken on the order (with associated dates and times), including approval history of your order if it required approval, supplier acceptance, receipt acknowledgment, and order cancellation if any. You can also see approver, buyer, or supplier notes, if any.

How does a buyer receive an order?

Once a buyer receives items ordered from a supplier, the buyer can mark the order as "Received." As a buyer, you do not have to indicate on TransportMAX that the order was received, but it may be helpful for your own records. It also lets the supplier see on TransportMAX that you have received the order. TransportMAX also provides a **Notes** area to let you enter remarks to the supplier about the condition of the received items.

You cannot mark individual items on an order as "Received" or not received. You can only indicate an entire order as "Received."

To indicate that you have received an order on TransportMAX, follow these steps:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click on the "Purchases" tab to open the **Purchases** home page, then click the "Receive Orders" link.

   You will see only those orders that are valid for receiving - orders with a status of **New** or **Accepted** only.

3. Select the order and click the "Receive" button.

   The status of the order changes to **Received**. This status is visible to both you and the supplier. To see orders with a **Received** status, click the "View Orders" link on the **Purchases** home page.

   Any notes you enter to the supplier (the notes are optional) are displayed to the supplier (and to you) in the order's "Action History." To see the receiving notes, click the "View Details" button for the order and click the "View Action History" link.

What is the effect on existing orders when a supplier deletes an item from the TransportMAX catalog?

When a supplier deletes an item from the TransportMAX catalog, and the item still exists on an order that a buyer created, the order is not changed. The item still displays on the order. However, when reordering items from that order, the item will not transfer to the new order.

How does a buyer cancel an order, and what happens?

Depending on the current status of an order, a buyer can either directly cancel an order or request a cancellation that needs to be accepted by the supplier. If the supplier already rejected the order (the order status is "Rejected") or if the buyer already received the order (the order status is "Received"), the buyer cannot cancel the order or request an order cancellation.

The information below describes how to cancel an order; what happens when you cancel a "Pending," "Acknowledgment Required," "New," or "Accepted" order; and how to view cancellations and cancellation requests.

Cancelling an Order
To cancel an order, follow these steps:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Purchases" tab, then the "View Orders" link.

3. From the drop-down menu at the "View" field, select which orders you want to view and click the "Go" button. You cannot cancel "Rejected" or "Received" orders.

4. Select the order and click the "Cancel Order" button.

5. Provide notes, if desired, about why you are canceling the order. Any notes you enter are displayed in the order's "Action History" to anyone who views the order. To see the notes, click the "View Details" button for the order, then click the "View Action History" link.

Cancelling "Pending" Orders
If the order is still being approved within the buyer's company (the order status is "Pending"), the buyer can directly cancel the order. The order changes to a "Cancelled" status and its notification for approval is automatically removed from the approver's "To Do List." No further action is required from the approver.

Cancelling "Acknowledgment Required" Orders
If the buyer specified an "Acknowledge-By Date" when placing the order (the order status is "Acknowledgment Required") and then cancels the order before the supplier has responded, the order changes to a "Cancelled" status. A notification about the order cancellation, with the buyer's notes (if any), is also sent to the supplier. No further action is required from the supplier. The buyer can provide notes to the supplier when canceling the order. These notes, if any, are visible in the "View Action History" link when the supplier clicks the "View Details" button for the order.

Cancelling "New" or "Accepted" Orders
If the buyer did not specify an "Acknowledge-By Date" when placing the order (the order status is "New") or if the supplier already accepted the order (the order status is "Accepted"), a buyer's cancellation request for the order requires the supplier's approval. TransportMAX sends a notification to the supplier to request approval of the cancellation. Until the supplier responds, the order status is "Pending Cancel." If the supplier accepts the cancellation, the status of the order changes to "Cancelled." If the supplier rejects the cancellation, the order reverts to its original status of "New" or "Accepted." The supplier can also provide notes to the buyer. These notes, if any, are visible in the "View Action History" link when the buyer clicks the "View Order Details" button for the order. A notification about the supplier's response to the order cancellation request, with the supplier's notes (if any), is sent to the buyer.

Viewing Cancellations and Cancellation Requests
As a buyer, do the following to view your order cancellations and cancellation requests:

- To view orders for which you have requested a cancellation and to which the supplier has not yet responded, access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link), click the "Purchases" tab, then click the "View Orders" link. Look for those orders with a status of "Pending Cancel."

- To view orders which have been cancelled (because you cancelled them directly or because the supplier accepted your cancellation request), access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link), click the "Purchases" tab, then click the "View Orders" link. Look for those orders with a status of "Cancelled." To see notes from the supplier (if any) about the cancellation, select the order, click the "View Details" button, and click the "View Action History" link.

Order Approval

How does the approval process work?

Orders go through every approver in a hierarchy. The company administrator for your company defines the following order approval controls:

Company User	User's Approval Limit (USD)	User's Approving Manager	Default Approver
Joe Smith	100	Anna Garcia	
Anna Garcia	1,000	Mabel Young	
Mabel Young	50,000	Ben Moore	
Ben Moore	(No approval limit)	(No approving manager)	X

In the example above, if the company administrator allows order owners to approve their own documents:

- If Joe Smith creates an order for $100.00, the order requires no additional approval. As soon as Joe creates the order, it is sent to the supplier.
- If Joe Smith creates an order for $50,000.00, it goes first to Anna Garcia for approval, then Mabel Young for final approval.
- If Anna Garcia creates an order for $50,001.00, it goes first to Mabel Young for approval, then to the Ben Moore for final approval since this amount exceeds Mabel Young's approval limit.

In the example above, if the company administrator does not allow order owners to approve their own documents, order owners require approval on all of their orders, even if they're within the order owner's approval limits:

- If Joe Smith creates an order for $50.00, his order goes to Anna Garcia for final approval.
- If Anna Garcia creates an order for $1,000.00, it goes to Mabel Young for final approval.
- If Mabel Young had no approval limit (it is left blank), and Joe Smith creates an order for $60,000.00, Joe Smith's order goes first to Anna Garcia for approval, then Mabel Young for final approval.
- Even if Mabel Young has no approval limit, she still requires approval for orders she creates, from Ben Moore.

Approvers need to respond by the end of the "Respond By" date shown for the approval notification on the "To Do List" in "My Exchange." The "Respond By" date is the date by which the approver needs to respond before the notification is automatically forwarded to the next approver (or to the default approver, if this is the final approver), or before the order's "Acknowledge-By Date" or earliest "Need-By Date" is reached. (A buyer can specify different need-by dates for different items on an order; in this case, TransportMAX uses the earliest of those need-by dates.) If the approver does not respond by the end of the "Acknowledge-By Date" or earliest "Need-By Date," the order is automatically canceled.
The default approver does not have to be the final approver or someone outside the approval hierarchy. For example, Mabel Young in the example above, with an approval limit of $50,000.00, could be the default approver instead of Ben Moore. In that case, Mabel Young herself still needs approval by her manager Ben Moore for orders she creates over $50,000.00; however, she also plays the role of default

approver when the default approver is needed - for example, when a currency conversion rate is not found for an order created in a foreign currency.

After you create an order, a confirmation page lets you know whether the order has been sent to the supplier (if order owners can approve their own documents, and your order is within your approval limit) or has been sent to an approver (your order requires further approval). You can also track the order's approval using the **View Action History** page for the order. If you cancel the order before the current approver has taken an approval action, the order changes to a "Cancelled" status and its notification for approval is automatically removed from the approver's "To Do List."

When the final approver approves the document, it is sent automatically to the supplier.

What happens when I approve or reject an order?

Approvers receive a notification for each order requiring their approval, through e-mail and through the "To Do" list in "My Exchange." You should choose one method or the other to respond to a request for your approval.

Respond to the notification with any of the following actions:

- **Approve**
  If you are the final approver in the approval hierarchy, the order is sent to the supplier. Otherwise, the order is sent to the next approver.

- **Reject**
  The approval process stops. The order owner is informed of your rejection, and the order is canceled.

- **Reassign** (to anyone in your company who is registered with TransportMAX)
  The person to whom you reassign the notification, whether or not that person is in your approval hierarchy, inherits your approval limit and position in the hierarchy. In the following example, Anna Garcia reassigns an order from Joe Smith for $4,000.00 to Donald Borge, who is not a part of the approval hierarchy (but is a registered TransportMAX member with your company). For this order only, Donald Borge assumes an approval limit of $1,000, just like Anna Garcia's, and when he approves it, the order is sent to Mabel Young for final approval just like it would if the order had gone through Anna Garcia.

Company User	User's Approval Limit (USD)	User's Approving Manager
Joe Smith	100	Anna Garcia
Anna Garcia	1,000	Mabel Young
Mabel Young	5,000	(No approving manager)

If a buyer cancels an order before the current approver has taken an approval action, the order changes to a "Cancelled" status and its notification for approval is automatically removed from the approver's "To Do List."

What notifications do approvers receive?

Approvers receive any of the following notifications (as applicable) for each order requiring their approval, through e-mail and through the "To Do" list in "My Exchange":

- **TransportMAX order [Number] requires your approval**
  An order from a buyer in your company requires your approval.

- **CANCELLED: TransportMAX order [Number] requires your approval**
  This notification has been canceled before you had a chance to respond for either of the following two reasons:

  - You did not respond by the order's acknowledge-by date or, if the buyer did not give an acknowledge-by date, by the earliest need-by date on the order.

  - You did not respond in time, and the order was therefore forwarded to the next, or the default, approver.

From the notification, you can approve or reject the order, or reassign the approval notification to someone else.

How do I customize purchase orders?

You can add information such as headers and titles to the purchase order that is generated on TransportMAX. To customize your company's purchase orders, follow these steps:

1. Access the "Buying" application (on the TransportMAX home page, click the "Buying" link).

2. Click the "Purchases" tab, then the "Customize Purchase Order Text" link.

3. In the **Customize Purchase Orders** page, select the language you wish to create the purchase order in. This is used if you issue purchase orders to foreign country suppliers. If you only issue purchase orders in English, you may skip this step.

4. Enter the text that should appear at the top of the purchase order, for example, your company's name.

5. Enter the text that should appear above the shipping information, for example, Attn: Jane Doe.

6. Enter the text that should appear above the billing information, for example, Attn: Accounts Payable.

7. Click "Preview" to view the customized purchase order. If you wish to make any changes, click the "Back" button in your browser.

8. If you are satisfied with the customized purchase order, click "Apply Changes" to save the changes.

CHAPTER 4: CREATING NEGOTIATIONS

Getting Started with Negotiations

What are Negotiations?

TransportMAX offers flexible negotiation capabilities to buyers and sellers, enabling them to efficiently obtain the best possible prices for goods and services. Prices are established based on actual supply and demand at the time the negotiation is transacted.

The two different types of Negotiations available in TransportMAX - **Auctions** and **Request for Quotations (RFQs)** - use real-time interaction to drive dynamic prices based on information that extends beyond price to include lead times, quantity, and item-specific attributes. Buyers and sellers, who may never meet face-to-face, have the opportunity to bypass intermediaries and establish relationships that might not have been possible using more traditional methods of buying and selling.

What are the different types of Negotiations? When should I use each type?

The two types of TransportMAX Negotiations are Auctions and Request for Quotations (RFQs). Specific details about each Negotiation type appear in the table below. These details will help you determine whether to create an auction or RFQ. **During the pilot phase of TransportMAX, users will be limited to creating RFQs only.**

- **Auctions**
  Auctions to Buy (Buyer's, or Reverse, Auctions) enable buyers to solicit bids for goods and services that are clearly defined, such as office furniture and memory chips. The buyer can discover new suppliers and get competitive pricing or improved service. Buyers can tailor each auction to control who can see bids during the auction, whether multiple rounds of bidding are possible, and whether partial bids are allowed. Many different items can be included in an Auction.

  If permitted by the auctioneer, bidders can view all bids submitted while the auction is open. This information generates competition and encourages bidders to submit their best possible price. Once the auction is completed, bidders are immediately notified of the auction results via online notifications.

- **Request for Quotations (RFQs)**
  Request for Quotations enable buyers to collect quotations from suppliers for complex and hard-to-define items or services, such as made-to-order manufacturing or construction projects. The Request for Quotations process is generally the longest of the Negotiation processes. Once suppliers have submitted an initial round of proposals (quotations), the buyer has the power to fine-tune the RFQ and initiate detailed negotiations, as necessary. This process may go through multiple rounds of negotiations and quotes. Due to the nature of the RFQ, which can either be blind (buyer can see the quotes during the RFQ, but suppliers cannot) or sealed (neither buyer nor suppliers can see the quotes until the RFQ is closed and the quotes are unsealed), suppliers can never see each other's quotes while the Negotiation is in progress.

Details about each Negotiation type:

Negotiation Type	Auction	RFQ
Characteristics	Auctions allow buyers and sellers to solicit bids for items and services that are clearly defined, for example, office furniture and memory chips.	RFQs allow buyers to collect quotes from suppliers for complex items and services. Suppliers submit a single quote per round of negotiating. Buyer reviews the received quotes, amends the supplier list, and submits the RFQ for subsequent rounds of negotiating.
Initiated By	Buyers and Sellers	Buyers
Response Document	Bid	Quote
Type(s)	Buyer's Auction or Seller's Auction.	Request for Quotation, created only by buyer.
Style(s)	Open, Blind, or Sealed.	Blind or Sealed.
Multiple Rounds Supported?	Yes. Through bid controls, auctioneers can enable multiple rounds of bidding.	Yes. RFQs, by nature, usually lead to multiple rounds.
Can Include Multiple Items?	Yes.	Yes.
Other	**Multiple Bids:** If allowed by auctioneer, bidders may submit multiple bids. **Proxy Bidding:** Bidders can define price parameters and enable the system to automatically bid on their behalf. **Power Bidding:** In one step, bidders can revise their bids by a specified percentage for *all* items on which they have previously bid.	**Manual Extend/Early Close:** RFQ owners can manually extend an RFQ or close an RFQ earlier than the scheduled close date. **Multiple Quotes:** The RFQ business process allows suppliers to submit a single quote per round.

	AutoExtend: Auctioneers can enable the system to automatically extend the duration of an auction. **Manual Extend/Early Close:** Auctioneers can manually extend an auction or close an auction earlier than the scheduled close date. **Minimum Bid Decrement/Increment:** Auctioneers can specify minimum amounts of improvement between bids from a single bidder.	

Creating RFQs

How do I create a new RFQ?

TransportMAX Buyers can create RFQs composed of items or services they want to buy, then

To create a new RFQ:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to create an RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "Create RFQ" link on the left side of the page.

There are six main steps to creating a new RFQ:

- Describe your RFQ
- Enter business terms and conditions
- Add items
- Select quote controls
- Invite suppliers
- Review and submit the RFQ for publication to TransportMAX

After you have described your RFQ, you can follow the above steps in order, or you can proceed through the steps in any order by clicking on any step in the Navigation Bar at the top left of the page.
If you have previously created a TransportMAX RFQ, you can save time by copying an existing RFQ to a new RFQ using the copy RFQ feature. You can also streamline new RFQ creation by applying an RFQ template.

Step 1: Describe your RFQ

When you create a new RFQ, your first step is to describe your RFQ by naming your RFQ and selecting the style of RFQ you want to create.

To describe your RFQ, complete the following fields (* indicates a required field):

- **Buyer**
  Because your company owns the RFQ you are creating, your company's name will default into this field.

- **Contact**
  Because you are creating this RFQ on behalf of your company, your name will default into this field.

- ***RFQ Title**
  Enter a title or name for this RFQ.

- **RFQ Style**
  You must designate this RFQ as a blind or sealed RFQ.

  - **Blind**
    Only the Buyers can see quotes

  - **Sealed**
    Neither the buyer nor supplier can see the quotes until the quotes are unlocked/unsealed.

- **RFQ Event**
  If you need to monitor several related RFQs as a group rather than as individual RFQs, you may want to create an RFQ event (or add this RFQ to an existing RFQ event). To add this RFQ to an existing RFQ, select the event name from the drop-down menu at the " RFQ Event" field.

Note that once you proceed to the next step in creating your RFQ you cannot change any of the information on the **Describe Your RFQ** page. If you want to change your RFQ description, you must delete this RFQ and start a new one. To delete your RFQ, click the "Delete RFQ " button on any page that follows the **Describe Your RFQ** page. When you have finished describing your RFQ, click the "Next" button at the bottom of the **Describe RFQ** page to continue to the next step ("Enter Business Terms and Conditions") in creating a new RFQ.

Step 2: Entering business terms and conditions for my RFQ

When you create a new RFQ, you must enter the business terms and conditions that will govern the RFQ.

After you have entered your RFQ description, click the "Next" button at the bottom of the page (or click the "Enter Business Terms and Conditions" link at the top left of the page). You will link to the **Enter Business Terms and Conditions** page.

At the **Enter Business Terms and Conditions** page for a Buyer's RFQ, you will have an opportunity to provide all of the following information. Note that some of the information is required, and some is optional. Required information is marked with an asterisk (*):

RFQ Pricing Section

- ***RFQ Currency**
  From the drop-down list of values at the "Currency" field, select the currency for which you are creating this RFQ. The currency you select will be the currency in which you enter and view all monetary values for this RFQ.

  At the " RFQ Currency" field, you can elect to allow quotes in other currencies by selecting the appropriate checkbox. If you allow quotes in other currencies, then suppliers can submit their quotes in currencies other than the currency you have selected for your RFQ. However, when you view the RFQ quotes, TransportMAX will convert the RFQs to the currency you have selected for your RFQ.

  If you select the "Allow quotes in other currencies" option when entering your business terms and conditions for this RFQ, you must select the currencies you will allow in the RFQ and enter exchange rates for those currencies. To do so, click the "Define currency list" link.

- ***Price Precision**
  Price precision refers to the number of digits that can be entered in a field after the decimal point (ex. $12.50 vs. $12.501). Select a price precision value from the drop-down list of values at the "Price Precision" field.

- ***RFQ Outcome**
  Designate the outcome of the RFQ as either a spot-buy order or a long-term agreement. A spot-buy order is a one-time purchase, after which the buyer is not committed to any future purchases. A long-term agreement indicates that the buyer will commit to a contract for future purchases.

Agreement Terms Section

Agreement terms are optional, and apply **only** when you have selected "Long-term agreement" as the RFQ Outcome.

- **Agreement Start Date**
  Enter the date on which the Long-term agreement begins.

- **Agreement End Date**
  Enter the date on which the Long-term agreement expires.

- **Total Agreement Amount**
  Enter the maximum amount for which the Long-term agreement will be valid.

Billing Section

- ***Bill-To Address**
  Enter the address to which your RFQ bills should be sent. Your default bill-to address will appear in the "Bill-To Address" field. To enter a new address or to choose a bill-to address from your Company Address Book, click the "Address Book" button.

- **Payment Terms**
  Payment terms specify the provisions of payment for goods or services purchased. Payment terms can be selected from the drop-down list of values at the "Payment Terms" field.

Shipping Section

- ***Ship-To Address**
  Enter the address to which the RFQ items will be shipped. Your default ship-to address will appear in the "Ship-To Address" field. To enter a new address or to choose a ship-to address from your Company Address Book, click the "Address Book" button.

- **Carrier**
  Carrier is the shipping company that will deliver items to a buyer. Select a carrier from the drop-down list of values at the "Carrier" field.

- **Transportation Method**

- **FOB**
  FOB stands for "Freight on Board". FOB determines the point at which a buyer takes title of goods purchased. Select an FOB value from the drop-down list of values at the FOB field.

- **Freight Terms**
  Freight terms specify the provisions for payment of freight. Select freight terms from the drop-down list of values at the "Freight Terms" field.

Additional Information Section

- **Note to Suppliers**
  If desired, you can enter a text note to suppliers in the RFQ.

- **Add Attachment**
  Attachments contain additional descriptive information about items or services, such as technical specifications or engineering drawings. RFQ owners can include attachments in their RFQ, and suppliers can include attachments with their quotes. Click the "add attachments" link to add attachments.

  The file size limit for attachments is 4 MB. For attachment files larger than 4 MB, post the file to the Internet site of your choice, and include (in the "attachment" field in Exchange) the URL at which the attachment can be accessed. Include the full URL, for example: http://www.transportmax.com .

When you have finished entering your RFQ's business terms and conditions, information, click the "Next" button at the bottom of the **Enter Business Terms and Conditions** page to continue to the next step in creating a new RFQ. You may also proceed to the next step by clicking on the "Add Items" step (or any step) at the top left of the page.

Step 3: Adding Items to my RFQ

When you create a new RFQ, you must add the item(s) you want to purchase to the RFQ. You can enter items online, add items from the TransportMAX Catalog, or bulk load items from a spreadsheet into TransportMAX. The spreadsheet is especially useful if you are adding a large number of items to your RFQ.

After you have entered an RFQ description and the business terms and conditions of your RFQ, click the "Next" link at the bottom of the page (or click the "Add Items to the RFQ " link at the top left of the page). You will link to the **Add Items** page.

To add items online:

- On the **Add Items** page, click the "Enter Item Information" link.

- On the **Enter Item Information** page, you will have an opportunity to provide all of the following information. Note that some of the information is required, and some is optional. Required information is marked with an asterisk (*):

    - ***Item Description**
      Enter a brief text description of the item you want to purchase.

    - ***Category**
      The category describes the broad family or category to which the item belongs. TransportMAX has pre-defined categories for all items based on the UNSPSC Code. To enter a category, click the Flashlight icon next to the "Category" field. Search for a category by entering a category name, or the first letter of a category name, in the search field and clicking "Go." To browse the entire list of categories, simply click "Go."

      When you select a category for your RFQ item, any category attributes included with that category will be defaulted into the "Item Attribute" field on the **Enter Item Information** page, and the category attributes will be added to your RFQ item as item attributes. You can edit or delete any of the item attributes by selecting an attribute and clicking the appropriate button.

      Note: Depending on the category values allowed by your TransportMAX Operator, you may also be able to select a "generic" category (such as "Miscellaneous") for your RFQ item. If a "generic" category has been activated in TransportMAX, you will see a link next to the "Category" field that says: "Click here to select <generic category name>."

    - **Manufacturer**
      If desired, enter the name of the manufacturer of the RFQ item.

    - **Manufacturer Item**
      If desired, enter the manufacturer-assigned part number of the RFQ item.

    - **Item Attributes**
      To add item attributes to your item, click the either the "Enter Item Attributes" link or the "Apply Predefined Attribute Lists" link.

    - ***Unit of Measure**
      From the drop-down list of values, select the unit of measure in which you plan to purchase for an RFQ. TransportMAX recognizes the UN standardized UOM codes.

- ***Quantity**
  Enter the number of units of the item you want to purchase. Use your specified Unit. Use digits, e.g. "5."

- **Need-By Date**
  From the drop-down list of values, you may choose to enter the date by which the item you want to purchase is needed at your ship-to location.

- ***Ship-To Address**
  Enter the location address to which the item you want to purchase must be delivered. The ship-to address you specified when entering initial RFQ information will default into this field. To enter a different ship-to (or create a new address), click the "Address Book" button next to the ship-to address field and select (or create) a new address from your Company Address Book.

- **Price Precision**
  The price precision that you specified in the " RFQ Information" for this RFQ will default into this field.

- **Quote Start Price**
  If desired, enter the starting quote price for one unit of your RFQ item. List the quote start price in the UOM and currency that you have specified for this RFQ (the currency that you specified in the " RFQ Information" for this RFQ will default into this field). Use digits, e.g. "5.75." **Note:** Though the Quote Start Price is optional, this price is required to compute values on the RFQ Summary page. If you plan to use the **RFQ Summary** page to monitor this RFQ, enter a quote start price into the "Quote Start Price" field.

- **Target Price**
  If desired, enter the price you hope to pay for one unit of your RFQ item. List the target price in the UOM and currency that you have specified for this RFQ (the currency that you specified in the " RFQ Information" for this RFQ will default into this field). Use digits, e.g. "5.75." To display the target price to suppliers, check the "Display to suppliers" checkbox next to the "Target Price" field.

- **Current Price**
  The current price is the price you are currently paying to buy the item outside of an RFQ. The current price can be used to analyze RFQ performance. Use digits, e.g. "5.75." **Note:** Suppliers are never able to view the current price value.

- **Note to Suppliers**
  If desired, enter a text note about this RFQ item to the suppliers. (For example, you could enter a note to describe other attributes, such as color preferences, about the item.)

- **Add Attachments**
  If desired, include an attachment to the RFQ item. Attachments contain additional descriptive information about items, such as technical specifications or engineering drawings. The file size limit for attachments

is 4 MB. For attachment files larger than 4 MB, post the file to the Internet site of your choice, and include the URL at which the attachment can be accessed. Include the full URL, for example: http://www.transportmax.com.

- When you have finished entering your RFQ item information, click the "OK" button at the bottom of the **Enter Item** page.

    - You will return to the **Add Items** page. To enter another RFQ item, click the "Enter Item Information" link again and repeat the preceding step. You can also choose to add items to your RFQ from the TransportMAX catalog (see instructions below), or from a spreadsheet that you have created offline.

    - The RFQ item(s) that you have already entered for this RFQ will appear on the **Add Items** page. You can edit or delete any of your existing RFQ items by selecting the radio button next to the item and clicking the "Edit" or "Delete" button.

    - When you have finished entering all items for this RFQ, click the "Next" button at the bottom of the **Add Items** page to continue to the next step in creating your RFQ. You may also proceed to the next step by clicking on the "Select Quote Controls" step (or any step) at the top left of the page.

To add items from the TransportMAX Catalog:

- At the **Add Items** page, click the "Shopping" tab.

- On the **Shopping** page, use the "Item Search" field to search for the item you want to add to your RFQ.

- When you have find the item you want to add to your RFQ, select the item and click the "Add to Cart" button.

- At the **Shopping Cart Contents** page, you will see the item you have selected. If you want to add additional items from the TransportMAX Catalog, click the "Return to Shopping" button and repeat steps 2 and 3.

- When you have finished adding items to your shopping cart, review your selected item(s) on the **Shopping Cart Contents** page. When you are ready to add the item(s) to your RFQ, click the "Add to RFQ" button.

  You will return to the RFQ you have created, and you will see a message confirming the number of items you have added to your RFQ from the TransportMAX catalog. Click on the "Add Items" link in the navigation box at the top left of the page.

- The item(s) you added from the Catalog will appear on the **Add Items** page. Select one of the items and click the "Edit Details" button.

  Note: If the item(s) you have added from the catalog include(s) category attributes,

those category attributes will be defaulted into the "Item Attribute" field on the **Enter Item Information** page, and the category attributes will be added to your RFQ item as item attributes. You can edit or delete any of these item attributes by selecting an attribute and clicking the appropriate button.

- At the **Edit Item** page, you will see that the item description, category, manufacturer (if available), manufacturer item (if available), and unit of measure were downloaded from the Catalog into your RFQ. You can update those fields as necessary. You can also provide additional information about your RFQ item. See the list of fields in "Adding items online" above

- When you have finished entering your RFQ item information, click the "Done" button at the bottom of the **Edit Item** page. You will return to the **Add Items** page. Repeat Steps 7 and 8 for any other items you have downloaded from the Catalog.

- When you have finished editing the details of the RFQ item(s) you have downloaded from the Catalog, you can continue to add items to your RFQ. If you are finished adding items to your RFQ, you can continue to the next step in creating your RFQ.

- To continue adding items to your RFQ, follow the instructions in adding items online or bulk loading items from a spreadsheet.

- To continue to the next step in creating your RFQ, click the "Next" button at the bottom of the **Add Items** page to continue to the next step in creating your RFQ. You may also proceed to the next step by clicking on the "Select Quote Controls" step (or any step) at the top left of the page.

To bulk load items from a spreadsheet:

- At the **Add Items** page, click the "Load Item(s) from Spreadsheet" link.

- At the **Load Items from Spreadsheet** page, click the link that reads "Click here if you need to download a spreadsheet template."

- At the **Download Spreadsheet Now** page, click the "Download Now" button to save the WinZip file to the location of your choice. The WinZip file includes both the RFQ Item spreadsheet template and directions for completing the template.

- Open the "Readme" directions file that is included in the WinZip file and follow the directions to complete the RFQ items spreadsheet template.

- When you have completed the template, return to the **Load Item(s) from Spreadsheet** page and click the "Start Load Now" button. Follow the directions on the page to upload your RFQ items.

- When your RFQ item upload has completed, you will return to the **Add Items** page. The RFQ items that you uploaded for this RFQ will appear on the **Add Items** page.

- You can edit or delete any of your existing RFQ items by selecting the radio button next to the items and clicking the "Edit Details" or "Remove from RFQ " button.

- You can enter additional items to the RFQ online or from the TransportMAX catalog, if desired.

- When you have finished entering all items for this RFQ, click the "Next" button at the bottom of the **Add Items** page to continue to the next step in creating your RFQ. You may also proceed to the next step by clicking on the "Select Quote Controls" step (or any step) at the top left of the page.

Step 4: Select Quote Controls

When you create a new RFQ, you can set quote controls to determine the RFQ length, participants, quote frequency, and many other variables. Your quote control options are described below.

After you have entered the RFQ description, entered the RFQ's business terms and conditions, and added item(s) to the RFQ, click the "Next" link at the bottom of the page (or click the "Select Quote Controls" link at the top left of the page). You will link to the **Select Quote Controls** page, where you can set the following quote controls:

- **RFQ Duration: Open Date, Preview Date, and Close Date**

    - ***Open Date**
      The open date is the date and time at which all eligible suppliers are allowed to participate in the RFQ. The open date/time is required. You can choose to open the RFQ for quoting immediately (by clicking in the "Open the RFQ immediately" checkbox), or you can set a future date and time at which the RFQ will open for quoting.

    - **Preview Date**
      For RFQs that are set to open at a future date (not immediately), you can optionally set a date and time (prior to the open date and time) at which the RFQ will be available for preview (but not quoting) to all eligible RFQ participants. You can also choose to publish the RFQ for preview immediately by clicking the "Publish RFQ for preview immediately" checkbox.

    - ***Close Date**
      You must specify a date and time at which the RFQ will close for quoting. Once closed, no further quotes may be accepted for the RFQ. The close date/time is required.

      You can allow yourself the option to close the RFQ at a date and time prior to the RFQ close date and time you have entered. To enable this option, select the " RFQ can be manually closed" checkbox. You can also allow yourself the option to extend the RFQ by changing the RFQ close date and/or time while the RFQ is open for quoting (but not after it has closed for quoting). To enable this option, select the "RFQ can be manually extended" checkbox.

- **AutoExtend**
  You can choose to have your RFQ automatically extended if a new winning quote is received during the final minutes of your RFQ. For example, if you enable an AutoExtend of 30 minutes, with AutoExtend set to start at the *current scheduled RFQ close time*, and a new **winning quote** is received in the final 30 minutes of the RFQ (the AutoExtend period), your RFQ will be automatically extended for 30 minutes past the current scheduled close time.

  You can set the **length** of the each AutoExtend, the **number** of AutoExtensions that will occur,

and the **start time** of each AutoExtension. You can also choose to enable AutoExtend for ***all* items** in the RFQ whenever a winning quote on one item is received, or to enable AutoExtend **only for those items** that receive winning quotes.

To enable AutoExtend, click the radio button next to "Autoextend the RFQ using the settings shown below" in the "AutoExtend" section. If you elect to enable AutoExtend, you can change the following AutoExtend settings by clicking the "Change AutoExtend Settings" link in the "AutoExtend Settings" field (*indicates a required field):

- **Which items do you want to AutoExtend?**
  You can choose to extend quoting for *all* RFQ items, or only for those items that receive winning quotes during the AutoExtend period. The AutoExtend period is determined by the **length** of each AutoExtension (see below).

- ***How many AutoExtensions will you allow?**
  You can set the maximum number of times you will allow the RFQ to be extended, or you can choose to allow AutoExtend to occur indefinitely (until quoting has ended).

- ***How long is each AutoExtension?**
  You must specify the duration (in minutes) of each AutoExtend. This setting also determines the end-of-RFQ window (the AutoExtend period) during which a winning quote triggers an AutoExtension.

  For example, if you specify that each AutoExtension is 20 minutes, this means:

  - Each AutoExtension will last for 20 minutes after the **start time** you specify (below), *and*

  - The period **from** 20 minutes prior to the scheduled close of the RFQ **to** the scheduled close of the RFQ is the **AutoExtend period** during which a winning quote will trigger AutoExtend.

- **What is the start time of each AutoExtension?**
  You can choose to have AutoExtensions start at the scheduled close time of the RFQ, or start at the time that a winning quote is received during the AutoExtend period. For example, if you enable an AutoExtend of 30 minutes, and a winning quote is received in the final 30 minutes of the RFQ, your RFQ will be automatically extended for 30 minutes **past the scheduled close time of the RFQ** if you select "Current scheduled RFQ close time." However, your RFQ will be automatically extended for 30 minutes **past the time that the winning quote is received** if you select "Receipt time of the triggering winning quote."

Click the "Done" button on the **Change AutoExtend Settings** page when you have finished changing the settings.

Note that two other Quote Control settings on your RFQ can impact the "winning quote" that triggers an AutoExtension. Those quote controls are:

- **Can a supplier select items on which to quote?**
  You can specify that a supplier may quote on any individual item(s) the supplier chooses in an RFQ. In this case, a winning quote is determined by the **unit quote price** for an item. Your RFQ will AutoExtend only if the new unit quote price for an item is better than the current best unit quote price for that item.

  Alternatively, you can specify that a supplier must quote on all items in an RFQ. In

this case, a winning quote is determined by the **total quote value** (the sum of all of the quotes on the items in an RFQ). Your RFQ will AutoExtend only if the new total quote value is better than the total quote value of all current active quotes.

- **What is the minimum quote price decrement?**
  You can specify that suppliers must submit re-quotes that are better than their current quote price by a specific minimum decrement amount. In this case, a winning quote must fit both of the following criteria:

  - The quote must be the best quote price submitted in the RFQ, and

  - If a re-quote, the re-quote must be better than the supplier's own current quote price by the minimum quote decrement amount.

Note: If you *do not* enable AutoExtend while you are creating your RFQ, you can allow yourself the option to enable AutoExtend at any time while the RFQ is open: simply select the box next to " RFQ can be manually extended while open for quoting" (this appears below the "Close Date" field).

If you *do* enable AutoExtend while you are creating your RFQ, *and* you select the box next to " RFQ can be manually extended while open for quoting," you can revise any of your AutoExtend settings while the RFQ is open (prior to the AutoExtend period). After your RFQ has entered the AutoExtend period, the only AutoExtend setting you are allowed to change is to increase the number of AutoExtensions you will allow in the RFQ.

- **When will you award business?**
  You can optionally set an award date for this RFQ. The award date is the date by which you will select a winning quote(s) and award the RFQ.

- **Who can quote?**
  You can allow all TransportMAX registered members to quote on the RFQ, or you can specify that suppliers can participate by invitation only. (Note: If you specify that quoting is by invitation only, you must invite at least one supplier to participate in the RFQ. You will invite suppliers in Step Five of creating a new RFQ.)

- **Can Suppliers see other Suppliers' notes and attachments?**
  You can specify that suppliers in the RFQ will be allowed to see any notes and attachments included with other suppliers' quotes, or you can restrict suppliers from seeing other suppliers' notes and attachments.

  Note: This Quote Control is available for Sealed RFQs only.

- **Can this RFQ go into multiple rounds of quoting**?
  You can specify that this RFQ can continue into additional rounds of quoting after the RFQ close date, or you can specify that the RFQ will not be allowed to continue into additional rounds of quoting after the RFQ close date. For more information about initiating a new round of quoting, see "How do I initiate a new round of bidding in an RFQ?"

- **Can a supplier select items on which to quote?**
  You can specify that a supplier may quote on any individual item(s) the supplier chooses in an RFQ. Alternatively, you can specify that a supplier must quote on all lines in an RFQ in order for the quote to be valid.

- **Are full quantity quotes required?**
  You can specify that suppliers must submit quotes on the full quantity of quote items in the RFQ. Alternatively, you can allow suppliers to submit quotes on partial quantities of quote items. For example, if you create a Buyer's RFQ to purchase 100 wrenches, and you allow suppliers to quote on partial quantities, a supplier could submit a valid quote to supply you with 75 wrenches, rather than the full quantity of 100 wrenches.

- **Are multiple quotes allowed?**
  You can specify that a supplier must submit a single, best quote in the RFQ, or that suppliers may re-quote as many times as they like during the RFQ open period.

- **What is the minimum quote price decrement?**
  If you have selected to allow suppliers to submit multiple quotes, you can optionally specify that suppliers must submit re-quotes that are better than their current quote price by a specific minimum amount. In other words, re-quotes must decrease for Buyer's RFQs by a minimum amount. Enter the minimum amount in the appropriate "Minimum quote decrement" field. You can enter either a *straight amount* or a *percentage* by which quotes must improve (do not include a percent sign). Use digits, for example "10."

  Note: A bid decrement amount will always be *applied* to a supplier's **current** quote price. If you specify your quote decrement amount as a percentage, the decrement percentage will be *calculated* based on a supplier's **original** quote price, but will be *applied* to the supplier's **current** quote price. For example:

  Buyer's RFQ #1234; bid decrement = $100
  Supplier A's original quote = $1,000
  Supplier A's second quote = $900
  Supplier A's third quote = $800
  Supplier A would **not** be allowed to submit a fourth quote of $750 (this is less than the minimum quote decrement of $100).

When you have finished setting the quote controls for this RFQ, click the "Next" link at the bottom of the **Select Quote Controls** page to continue to the next step in creating a new RFQ. You may also proceed to the next step by clicking on the "Invite Suppliers" step (or any step) at the top left of the page.

Step 5: Invite Suppliers to an RFQ

When you create a new RFQ, you can choose to send RFQ invitations to selected suppliers. If you are creating an invitation-only RFQ, you *must* invite at least one supplier to quote on your RFQ. Even if your RFQ is open to all TransportMAX members, you may still wish to send invitations to select suppliers to encourage their participation.

After entering your RFQ description, entering your RFQ's business terms and conditions, adding item(s) to the RFQ, and setting the RFQ's bid controls, you will have the option to invite suppliers to participate in your RFQ on the **Invite Suppliers** page. You can invite suppliers who are already registered with TransportMAX, as well as suppliers who have not yet registered with TransportMAX (though unregistered suppliers must register with TransportMAX before they can participate in the RFQ).

- To invite TransportMAX registered companies to participate in the RFQ, click the "Invite TransportMAX Members" link on the **Invite Suppliers** page, and search for suppliers (by company name) to invite to the RFQ. You can also browse the Trading Partner Directory by clicking on any letter of the alphabet, or the "Show All" link, above the "Search" fields. Click the checkbox to the left of any supplier you want to invite to your RFQ, then click the "Add to Suppliers List" button.

- To invite non-TransportMAX members to participate in the RFQ, click the "Invite Non-Members" link on the **Invite Suppliers** page.

    1. At the **Invite Non-Member** page, provide the name and e-mail address of the company you want to invite. You may also include the first and last name of the supplier company's contact person, as well as a note to the supplier.

    2. Click the "Done" button.

    3. TransportMAX will send a notification to the supplier company inviting the company to register with TransportMAX in order to participate in your RFQ. **Note:** Only TransportMAX registered member companies can participate in TransportMAX RFQs.

    4. Continue to send RFQ invitations as desired.

- To invite suppliers on a predefined Invitation List, click the "Apply Predefined Invitation List" link. Search for the Invitation List you want to apply by entering your search criteria into any or all of the "Invitation List Search" fields on the **Apply Predefined Invitation List** page, then clicking the "Go" button. The search fields include:

    - **List Name**
      If you know the name of the Invitation List for which you're searching, enter it in the "List Name" field. You can also enter any part of the Invitation List name into the "List Name" field to search for all Invitation Lists that contain your search term anywhere in the list name. For example, a List Name search on the letters "supp" would return the list named "Office **Supp**ly Suppliers."

    - **Description**
      You can enter any search term that describes the Invitation List for which you're searching. You will see all Invitation Lists that contain your search term anywhere in the Invitation List description. For example, a Description search on the term "office" would return the Invitation List that includes the description "Suppliers for U.S. **office** supply RFQs."

    - **Participant**
      You can enter the name of any participant that appears on the Invitation List for which you're searching. You will see all Invitation Lists that include the participant name you have entered in the "Participant" field.

      In the "Invitation List Search Results" field, select the radio button to the left of the Invitation List you want to apply, then click the "Apply to RFQ" button. The participants on the list you have selected will be applied to your RFQ. You can edit the predefined Invitation List as appropriate.

      Note: You can also send RFQ invitations to suppliers while your RFQ is open for bidding.

When you have finished inviting TransportMAX members and/or non-members to quote on your RFQ, click the "Next" link at the bottom of the **Invite Suppliers** page to continue to the next step in creating a new RFQ. You may also proceed to the next step by clicking on the "Review and Submit" step (or any step) at the top left of the page.

What is an RFQ event?

An **RFQ Event** is several related RFQs grouped together. All RFQs included in an RFQ Event will open on or after the scheduled Event Open date/time. You may want to create an RFQ Event if you need to monitor several related RFQs as a group rather than as individual RFQs. You may also want to create an RFQ Event if you want to encourage suppliers to participate in multiple, similar RFQs.

When you create a new RFQ, you can associate the RFQ with an existing RFQ Event by selecting the Event from the drop-down menu at the "RFQ Event" field on the **Step 1: Describe Your RFQ** page.

The sections below provide more information about creating an RFQ Event and monitoring an RFQ Event.

Creating an RFQ Event:

- **To create an RFQ Event while creating a new RFQ:**
    - Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to create a Buyer's RFQ.
    - Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.
    - Click the "Create RFQ" link on the left side of the page.
    - On the **Step 1: Describe Your RFQ** page, scroll down to the "Include this RFQ in an RFQ Event?" section and click on the "Create RFQ Event" button.
    - On the **Create New RFQ Event** page, enter an event title into the "Event Title" field, then enter a brief event description into the "Event Description" field.
    - Enter a start date and time in the "Event Start Date" field.
        - The Event start date and time must be later that the current date and time.
        - All RFQs associated with this RFQ Event must open on or after the Event start date and time. After the Event start date and time has passed, you will not be able to associate new RFQs with this RFQ Event.
    - Click the "OK" button to create your RFQ Event.
- **To create an RFQ Event from the RFQs home page:**
    - Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link.
    - Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.
    - Click the "Create New Event" link on the left side of the page.
    - On the **Create New Event** page, enter an event title into the "Event Title" field, then enter a brief event description into the "Event Description" field.

- Enter a start date and time in the "Event Start Date" field.
    - The Event start date and time must be later that the current date and time.
    - All RFQs associated with this RFQ Event must open on or after the Event start date and time. After the Event start date and time has passed, you will not be able to associate new RFQs with this RFQ Event.
- Click the "OK" button to create your RFQ Event.

Monitoring an RFQ Event

- Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to create a Buyer's RFQ.
- Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.
- Click the "View All Events" link on the left side of the page.
- Select the radio button to the left of the RFQ Event you want to monitor, then click the "View Event RFQs" button.
- All of the RFQs associated with this RFQ Event will be displayed on the **Event RFQs** page. You can select the radio button to the left of any RFQ in the Event, then click the "RFQ Summary", "View RFQ", or "View Quote History" buttons for details about the RFQ and its quotes.

  Note: While you can monitor, as a group, all RFQs included in an RFQ Event, you must individually award each RFQ included in any RFQ Event.

Are there any shortcuts to creating new RFQs?

You can streamline RFQ creation in two ways: by copying an existing RFQ or by using an RFQ template.

Copy RFQ
The **Copy RFQ** feature allows you to copy an existing RFQ that you, or any other TransportMAX user from your company, have created. The details of an existing RFQ can be copied into a new RFQ, which you can then edit. The copy RFQ feature saves you time by eliminating the need to enter the same RFQ information into every new RFQ you create.

RFQ Templates
If the majority of the RFQ s you create contain the same features - the same item attributes, terms and conditions, controls, etc. - you may want to create an **RFQ template** that you can use each time you create a new RFQ. Your RFQ template will contain the features that are similar among the RFQs you commonly create. When you create a new RFQ using a template, you simply open the template, add to and edit details of the template (as necessary), and publish your RFQ. Templates can be used over and over again.

You can create as many RFQ templates as you like. You can create both "private" templates (templates that only you can view, edit, and use) and "public" templates (templates that all TransportMAX users in your organization can view and use).

What is the "Copy RFQ" feature?

If you have previously created a TransportMAX RFQ, or if any other TransportMAX user in your organization has created an TransportMAX RFQ, you can create a new RFQ by copying the existing RFQ, then editing the details of the new RFQ. The **Copy RFQ** feature saves you time by eliminating the need to enter the same RFQ information into every new RFQ you create.

To copy an existing RFQ:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to copy an RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "Create RFQ" link on the left side of the page.

4. On the **Step 1: Describe Your RFQ** page, click the "Copy" a RFQ you've already created link in the "Time-Saving Tip" box on the right side of the page.

5. Search for the RFQ you want to copy by entering your search criteria into any or all of the " RFQ Search" fields on the **Copy RFQ** page, then clicking the "Go" button.

6. In the "RFQ Search Results" field, select the radio button to the left of the RFQ you want to copy, then click the "Copy to New RFQ " button. The details of the RFQ you have selected to copy will be copied into a new RFQ.

7. You can edit any of your new RFQ information by proceeding through the steps of creating a RFQ, or by clicking on the appropriate "Create New RFQ " step on the left side of the page.

8. When you have finished creating your new RFQ, click on the "Review and Submit" step on the left side of the page. Review your RFQ information, then click the "Submit" button.

To search for a RFQ to copy:
Enter your RFQ search criteria into any or all of the three search fields on the **Copy RFQ** page, then click the "Go" button. If you leave all of the search fields blank, then click the "Go" button, the search engine will return all RFQs created by TransportMAX users from your company. The three search fields are:

- **Title**
  If you know the title of the RFQ for which you are searching, enter it in the "Title" field. You can also enter any part of the title into the "Title" field to see a list of all RFQs that contain your search term anywhere in the RFQ title. For example, a Title search on the letters "sel" would return the RFQ titled "**Sel**ler's RFQ for Wheels" and "Office Supply Re**sel**ler RFQ."

- **Number**
  If you know the RFQ number (automatically assigned by TransportMAX) of the RFQ for which you are searching, enter it in the "Number" field. You must enter the entire RFQ number; for example, entering two digits of a four-digit RFQ number will not return any search results.

- **Creation Date Window**
  If you know the approximate creation date of the RFQ for which you are searching, enter the number of days that will include the RFQ's creation date in the "Created in the Last ___ Days" field. For example, if you know that the RFQ was created three days ago, enter "3" in the appropriate field.

How do I create and edit RFQ templates?

If the majority of the RFQs you create contain the same features - the same quote attributes, business terms and conditions, quote controls, etc. - you may want to create an **RFQ template** that you can use each time you create a new RFQ. Using an RFQ template can save you time by streamlining the RFQ creation process. Your RFQ template will contain the features that are similar among the RFQs you commonly create. When you create a new RFQ using a template, you simply open the template, add to and edit details of the template (as necessary), and publish your RFQ. Templates can be used over and over again.

You can create as many RFQ templates as you'd like. You can create both "private" templates (templates that only you can view, edit, and use) and "public" templates (templates that all TransportMAX users in your organization can view and use).

Note: In order to create "public" RFQ templates, you must be assigned the appropriate access by your TransportMAX Company Administrator. Contact your TransportMAX Company Administrator with questions and requests regarding your access.

The sections below describe how to create a new RFQ template and how to edit the templates you have created.

Creating a New RFQ Template
To create a new RFQ template:

1. Access the "Marketplace Buying" application to create a Buyer's RFQ template.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the **RFQs** home page, click the "RFQ Templates" link.

4. On the **RFQ Templates** page, click on the "Create New Template" link.

5. On the **Step 1: Describe Your Template** page, complete the following fields (required fields are marked with an *asterisk):

    - *Enter the **name** of your new template in the "Template Name" field.

    - You may optionally enter a **description** of your template in the "Description" field.

    - *From the drop-down menu at the "Access" field, select the **access** you want to apply to this template. A template can be designated as either "public" (all TransportMAX buyers in your company can view and use the template) or "private" (only you can view, edit, and use the template).

      Note: In order to create "public" RFQ templates, you must be assigned the appropriate access by your TransportMAX Company Administrator. Contact your TransportMAX Company Administrator with questions and requests regarding your access.

    - *Select the **style** of RFQ for which you are creating this template. You can create a template for a "blind" RFQ (only the buyer can see the

quotes in the RFQ), or a "sealed" RFQ (neither buyers nor the suppliers in an RFQ can see the quotes until the quotes are unlocked).

- Your template **status** will default to "Active." "Active" templates can be used immediately to create new RFQs. If you want to change your template's status to "Inactive," you must complete and submit your template, then edit your template and select a new status from the drop-down menu at the "Status" field. "Inactive" templates will be stored in TransportMAX, but cannot be used to create a new RFQ until you change the status to "Active."

- When you have finished entering information on the **Step 1: Describe Your Template** page, click the "Next" button at the bottom of the page.

  Note: Once you proceed to the next step in creating a new template, you cannot change the information entered on the **Step 1: Describe Your Template** page.

6. On the **Step 2: Enter Business Terms and Conditions** page, enter the business terms and conditions you want to appear on this RFQ template.

   Note that you are not *required* to enter any business terms and conditions on your RFQ **template** (even for those fields that are required when creating a new **RFQ**). For example, you are required to enter a Bill-To Address when creating a new Buyer's RFQ, but you are not *required* to enter a Bill-To Address on your RFQ template. If you do not enter a Bill-To Address on your template, then the Bill-To Address must be entered by the buyer each time the template is used to create a new RFQ.

   When you have finished entering your business terms and conditions, click the "Next" button at the bottom of the **Step 2: Enter Business Terms and Conditions** page.

7. On the **Step 3: Enter Item Information** page, you can opt to enter the category and/or item attributes that will apply to **all** items added to an RFQ that is created using this template. Any category and/or item attributes that you add to your template will be the default values for all items added to an RFQ that is created with this template; however, these default values can be changed by the buyer when creating a new RFQ.

   - To set a category for your template, enter the category name in the "Category" field, or click the "Flashlight" icon to search for the category of your choice.

     Note: When you select a category for your RFQ template, any category attributes included with that category are **not** copied to the RFQ *template*. However, the category's attributes (if any) **will** be copied into any *RFQ* created with the template, and will be added to RFQ items as item attributes. The RFQ owner can edit or delete any of the item attributes.

   - If desired, add item attributes to your RFQ template. You can add item attributes to your template by creating new item attributes, and/or by applying a predefined attribute list to your template.

- To create **new** item attributes for your template, click the "Enter New Item Attributes" link. On the **Add Attributes** page, enter your attribute information in the appropriate fields.

- To apply an **attribute list** to your template, click the "Apply Predefined Attribute Lists" link. Search for the attribute list you want to apply by entering your search criteria into any or all of the "Attribute List Search" fields on the **Apply Attribute Lists** page, then clicking the "Go" button.

When you have finished entering your category and/or attribute information, click the "Next" button at the bottom of the **Step 3: Enter Item Information** page.

8. On the **Step 4: Select Quote Controls** page, you can opt to set quote controls for your RFQ template.

   When you have finished entering your quote controls, click the "Next" button at the bottom of the **Step 4: Select Quote Controls** page.

9. On the **Step 5: Add Suppliers** page, you can opt to select TransportMAX members to add to the Suppliers List for this template. All TransportMAX members who are added to this template's Suppliers List will receive an invitation to participate in any RFQ created using this template. Note that any buyer who uses this template to create an RFQ may choose to add or delete suppliers when creating an RFQ.

   Note: If, during "Step 4: Select Quote Controls," you specified that quoting is by invitation only, then at least one supplier must be 1) included on the Suppliers List for this template, or 2) invited by any buyer who uses this template to create an RFQ.

   When you have finished adding suppliers to your Supplier List, click the "Next" button at the bottom of the **Step 5: Add Suppliers** page.

10. On the **Step 6: Review and Submit** page, review your RFQ template information. If you need to make changes, use your Browser's "Back" button (or the Navigation Bar on the left side of the page) to navigate to the appropriate page and field. When you are satisfied with your template, click the "Submit" button.

Editing RFQ Templates

You can edit RFQ templates that you have created. To edit an RFQ template:

1. Access the "Marketplace Buying" application to edit an RFQ template.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the **RFQs** home page, click the "RFQ Templates" link.

4. On the **RFQ Templates** page, search for the template you want to edit by entering your search criteria into any or all of the "Template Search" fields, then clicking the "Go" button. The search fields include:

   - **Template Name**
     If you know the name of the template for which you're searching, enter it

in the "Template Name" field. You can also enter any part of the template name into the "Template Name" field to search for all templates that contain your search term anywhere in the template name. For example, a Template Name search on the letters "trans" would return the template named "**Trans**portation RFQ Template."

- **Description**
  You can enter any search term that describes the template for which you're searching. You will see all templates that contain your search term anywhere in the template description. For example, a Description search on the term "transport" would return the template that includes the description "Template for US **transport**ation RFQs."

- **Status**
  Use the drop-down menu at the "Status" field to search for an **Active** template, an **Inactive** template, or a template in **Any** status.

5. In the "Template Search Results" field, select the radio button to the left of the template you want to edit, then click the "Edit Template" button. The template you want to edit will open.

6. You can edit your template by working through each step of editing a template, or by selecting the step you want to edit from the Navigation Bar on the left side of the page. The steps of editing a template are the same as those used to create a new template:

   - **Step 1: Describe your Template**
     In Step 1, you can edit your template's description, access, and/or status.

   - **Step 2: Enter Business Terms and Conditions**
     In Step 2, you can edit your template's business terms and conditions.

   - **Step 3: Enter Item Information**
     In Step 3, you can edit your template's category and/or attributes.

   - **Step 4: Select Quote Controls**
     In Step 4, you can edit your template's quote controls.

   - **Step 5: Add Suppliers**
     In Step 5, you can add and/or delete suppliers on your template's Suppliers List.

7. When you have finished editing the details of your template, review your template information on the Step 6: Review and Submit page. If you need to make changes, use your Browser's "Back" button (or the Navigation Bar on the left side of the page) to navigate to the appropriate page and field. When you are satisfied with your template, click the "Submit" button.

How do I use RFQ templates?

If you have created a RFQ template, or a TransportMAX user in your company has created a public RFQ template, you can choose to use a template to create a new RFQ.

To use an RFQ template:

1. Access the "Marketplace Buying" application to create a Buyer's RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "Create RFQ" link on the left side of the page.

4. On the **Step 1: Describe Your RFQ** page, click the "Apply a template" link in the "Time-Saving Tip" box on the right side of the page.

5. Search for the template you want to apply by entering your search criteria into any or all of the "Template Search" fields on the **Apply RFQ Template** page, then clicking the "Go" button. The search fields include:

    - **Template Name**
      If you know the name of the template for which you're searching, enter it in the "Template Name" field. You can also enter any part of the template name into the "Template Name" field to see a list of all templates that contain your search term anywhere in the template name. For example, a Template Name search on the letters "sel" would return the templates named "**Sel**ler's RFQ Template for Wheels" and "Office Supply Re**sel**ler RFQ Template."

    - **Description**
      You can enter any search term that describes the template for which you're searching to see a list of all templates that contain your search term anywhere in the template description. For example, a Description search on the term "transport" would return the templates that include the descriptions "U.S. **transport**ation RFQs" and "RFQs to **transport** manufacturing goods." **Note:** When creating a RFQ template, the template description is not required. Some templates may have Names, but no accompanying Description.

    - **Show me only my templates**
      If you select the "Show me only my templates" checkbox, TransportMAX will only search for RFQ templates among those templates that you have created and designated as "private." If you do not select this checkbox, TransportMAX will search for RFQ templates among all of your company's templates (your private templates as well as all "public" templates).

6. In the "Template Search Results" field, select the radio button to the left of the template you want to apply, then click the "Apply Template" button. The details of the template you have selected will be defaulted into a new RFQ.

7. You can add to and edit any of your new RFQ information by proceeding through the steps of creating a RFQ, or by clicking on the appropriate "Create New RFQ" step on the left side of the page.

8. When you have finished creating your new RFQ, click on the "Review and Submit" step on the left side of the page. Review your RFQ information, then click the "Submit" button.

How do I create and edit a reusable RFQ Invitation List?

If you typically invite the same core group of participants to many (or all) your RFQs, you can add these participants to a reusable **Invitation List** to use with your RFQs. Using an Invitation List can help standardize your business practices by ensuring that all appropriate participants are invited to targeted RFQs. You can add an Invitation List(s) when creating a new RFQ; you can also attach an Invitation List(s) to a RFQ template.

The sections below describe how to create a new Invitation List and how to edit the Invitation Lists you have created.

Creating a New Invitation List
To create a new Invitation List:

1. Access the "Marketplace Buying" (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Negotiations" tab, "RFQs" in the task bar directly below the tabs.

3. Click the "Reusable Invitation Lists" link.

4. On the **Invitation List** page, click "Create New Invitation List."

5. On the **Create Invitation List** page, complete the following fields (*indicates a required field):

    - *Enter the **name** of your new Invitation List in the "List Name" field.

    - *Enter a brief **description** of your Invitation List in the "Description" field. Your description might include the type of RFQ to which this Invitation List would typically apply.

    - *From the drop-down menu at the "Access" field, select the **access** you want to apply to this Invitation List. An Invitation List can be designated as either "public" (all TransportMAX users in your company can view and use the list) or "private" (only you can view, edit, and use the list).
      Note: In order to create "public" Invitation Lists, you must be assigned the appropriate access by your TransportMAX Company Administrator. Contact your TransportMAX Company Administrator with questions and requests regarding your access.

    - Your Invitation List **status** will default to "Active." "Active" lists can be used immediately to create new RFQs. If you want to change your Invitation List's status to "Inactive," you must complete and submit your list, then edit your list and select a new status from the drop-down menu at the "Status" field. "Inactive" Invitation List will be stored in TransportMAX, but cannot be used until you change the status to "Active."

6. Add participants to your Invitation List by clicking the "Add TransportMAX Members" link, then searching for participants on the **Invite TransportMAX Members** page. When you have located a participant you want to add to your list, select the checkbox to the left of the participant's name, then click the "Add to Invitation List" button.

7. Continue searching for participants to add to your Invitation List. When you have finished adding participants to your list, click the "Submit" button.

Editing Invitation Lists

To edit a Invitation List you have created:

1. Access the "Marketplace Buying" (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "Reusable Invitation Lists" link.

4. On the **Invitation Lists** page, search for the Invitation List you want to edit by entering your search criteria into any or all of the "Search for Invitation List" fields, then clicking the "Go" button. The search fields include:

    - **List Name**
      If you know the name of the Invitation List for which you're searching, enter it in the "List Name" field. You can also enter any part of the Invitation List name into the "List Name" field to search for all Invitation Lists that contain your search term anywhere in the list name. For example, a List Name search on the letters "trans" would return the list named "**Trans**portation RFQ Suppliers."

    - **Description**
      You can enter any search term that describes the Invitation List for which you're searching. You will see all Invitation Lists that contain your search term anywhere in the Invitation List description. For example, a Description search on the term "transport" would return the Invitation List that includes the description "Attributes for US **transport**ation RFQs."

    - **Status**
      You can search for Invitation List in "Active," "Inactive," or "Any" status. From the drop-down menu at the "List Status" field, select the status of the list for which you're searching.

    - **Participant**
      You can enter the company name of any participant that is included on the Invitation List for which you're searching. You will see all Invitation Lists that include the participant name you have entered in the "Participant" field.

5. In the "Invitation List Search Results" field, select the radio button to the left of the list you want to edit, then click the "Edit" button.

6. On the **Edit Invitation List** page, edit the list's Description, Status, and Access as appropriate. Note that you cannot edit the Name of your Invitation List.

7. On the **Edit Invitation List** page, you can also delete participants from your list, or add participants to your list:

    - To delete a participant from your list, select the checkbox to the left of the participant's name, then click the "Delete" button.

    - To add a participant to your list, click the "Add TransportMAX Members" link. Search for a participant to add to your list, select the checkbox to the left of the participant's name, and click the "Add to Invitation List" button.

8. When you have finished editing your Invitation List, click the "Apply Changes" button. To cancel **all** edits you have made to your list, click the "Clear Changes" button.

Can my RFQ accept responses in multiple currencies?

When you create a new RFQ on TransportMAX, you have the option to accept responses (quotes or quotes) in currencies other than the currency you set for the RFQ (called the "RFQ Currency"). Whenever you view the responses you have received for your RFQ, however, TransportMAX will automatically convert the responses to the RFQ Currency, and you will always see all responses in the currency you have selected for your RFQ.

Though participants in a multi-currency RFQ can submit responses in several currencies, participants are only allowed to respond in ***one currency per response***.

If you select the "Allow responses in other currencies" option when creating your RFQ, you must select the currencies you will allow participants to use in the RFQ, and enter exchange rates for those currencies. To do so, click the "Define currency list" link next to the "Allow responses in other currencies" checkbox.

The following sections explain how to define your currency list and currency exchange rates and how to restrict participants to specific currencies when you are creating a new RFQ.

To define your currency list and currency exchange rate:

1. In **Step 2** of creating your new RFQ, select a RFQ Currency from the drop-down menu at the "RFQ Currency" field. The RFQ Currency is a required value, and is one currency in which all responses in the RFQ can be transacted. The RFQ Currency is also the currency in which you will view all responses received in the RFQ.

2. Click the checkbox next to "Allow responses in other currencies," then click the "Define currency list" link. You will link to the **Valid Currencies** page. The RFQ transaction currency you have set for this RFQ (in the previous step) will appear in the "RFQ Currency" column.

3. Select the *Exchange Rate Type* you wish to use for this RFQ:

- If you select the radio button next to "Use the rates I define below," you must set exchange rates for all of the Response Currencies you will accept in the RFQ.

  - Click the "Publish exchange rates to participants" checkbox if you want to allow participants to see the currency exchange rates you are defining for your Response Currencies. (If you check this box, participants will be able to see your Response Currency exchange rates when submitting responses.)

  - Continue to Step 4 below.

- If you select the radio button next to "Use the rates my company has established for this date," you will allow responses in **all** of the valid Response Currencies and corresponding exchange rates that have been loaded to TransportMAX by your TransportMAX Company Administrator for your company's use. Participants will be able to enter responses in all valid currencies that your TransportMAX Company Administrator has loaded to TransportMAX. For more information about the available currencies and exchange rates, contact your TransportMAX Company Administrator.

  If you select this option:

  - Enter the date for which you want to use the established rates.

  - If you want to allow participants to see the currency exchange rates you are defining for your Response Currencies, click the "Publish exchange rates to participants" checkbox. (If you check this box, participants will be able to see your Response Currency exchange rates when submitting responses.)

  - Click the "Done" button to return to the **Step 2: Enter Business Terms and Conditions** page, where you can continue creating your RFQ. You do not need to define specific Response Currencies on the **Valid Currencies** page (you do not need to continue to Step 4 below).

4. From the drop-down menu in the "Response Currency" column, select a currency in which you will accept responses for this RFQ.

5. Enter a currency exchange rate into the field in the "Exchange Rate" column. The currency exchange rate you enter will be used to convert all responses received in this Response Currency to the RFQ Currency you have set for this RFQ. Use digits (such as 2.5). For example, if your RFQ Currency is USD, the Response Currency for which you are entering an exchange rate is ZWD, and you enter an exchange rate of 25, the exchange rate will be calculated as "one USD is equal to 25 ZWD."

   You are required to enter a currency exchange rate whenever you add a Response Currency to your RFQ. The currency exchange rate applies for the life of the RFQ and the awarding of the RFQ.

6. From the drop-down menu in the "Price Precision" column, select a price precision for responses in this currency (or leave the price precision value at its default value: "any"). Price precision refers to the number of digits that can be entered after the decimal point.

7. If you want to add another Response Currency to the currency list for this RFQ, click the "Add Another" button. If you want to delete any Response Currencies you have added to the currency list, click the "Delete" link next to the Response Currency you want to delete.

8. When you have finished adding Response Currencies to your currency list, click the "Done" button on the **Valid Currencies** page. You will return to the **Step 2** of your new RFQ, and you can continue creating your RFQ.

9. All participants in the RFQ will have the option to respond in any of the Response Currencies you have defined on your currency list. Participants can also respond in your RFQ Currency.

To restrict participants to specific currencies:

If you checked the "Allow responses in other currencies" box and defined your currency list on the **Valid Currencies** page, you can also choose to restrict specific participants to particular Response Currencies.

Note: If you elected to allow responses in other currencies, and also elected to use the rates your company has established for a specific date, you cannot restrict participants to respond in specific currencies. All participants in the RFQ will be allowed to respond in ***any*** of the valid Response Currencies for this RFQ.

You can assign currencies to specific participants when you invite participants to your RFQ.

1. Enter your RFQ Invitations. For each participant, select a Response Currency from the drop-down menu in the Response Currency column.

    - If you accept the default "any valid for RFQ," the participant can respond in any currency you have set for this RFQ: the RFQ Currency you set for this RFQ, as well as all Response Currencies on the currency list you defined in **Step 2** of creating your new RFQ. If you did not define a currency list in **Step 2**, then your RFQ Currency is the only valid currency.
      ***Reminder*:** If you checked the "Allow responses in other currencies" box and did *not* define a currency list, then you *must* assign Response Currencies to specific participants. Leaving the default "any valid for RFQ" without selecting Response Currencies for specific participants will result in error.

    - If you select a specific Response Currency for a participant, the participant can only submit a response in either that currency or the RFQ Currency you set for this RFQ. The participant may not submit a response in any of the currencies you defined on your currency list in **Step 2**.

    - If the Response Currency you select at this time for a specific participant is NOT on the currency list you defined in **Step 2**, then that Response

Currency is available to that participant alone. No other participants in the RFQ may respond in that Response Currency (unless, of course, you associate that Response Currency with another participant(s) at this time).

- If the Response Currency you select at this time for a specific participant IS on the currency list you defined in **Step 2**, then that participant is restricted to responding in either the specified Response Currency or the RFQ Currency. In addition, the Response Currency in question is also available to all other participants in the RFQ.

- **Participants are only allowed to respond in one currency *per response*.**

- Participants can submit several *initial* responses, each in a different currency, on a multi-currency RFQ. However, if a participant submits a *follow-up response* - for example, a re-quote - to improve an initial response or after an initial response has been disqualified, the follow-up response must be in the same currency as the initial response.

2. Enter a currency exchange rate into the field in the "Exchange Rate" column. The currency exchange rate you enter will be used to convert all responses received in this Response Currency to the RFQ Currency you have set for this RFQ. Use digits, for example, "2.5." You are required to enter a currency exchange rate whenever you add a Response Currency to your RFQ. The currency exchange rate applies for the life of the RFQ and the awarding of the RFQ.

   When you are inviting participants to your RFQ, you can also use the "Exchange Rate" field to edit the currency exchange rate you set for a Response Currency you defined in **Step 2**. Select the Response Currency from the drop-down menu and enter a new currency exchange rate in the "Exchange Rate" field. Note that this revised currency exchange rate will only apply to the participant with whom you have associated it when you are inviting participants.

3. From the drop-down menu in the "Price Precision" column, select a price precision for responses in this currency (or leave the price precision value at its default value: "any"). Price precision refers to the number of digits that can be entered after the decimal point.

   When you are inviting participants to your RFQ, you can also use the "Price Precision" field to edit the price precision value you set for a Response Currency you defined in **Step 2**. Select the Response Currency from the drop-down menu, then select a new price precision value from the drop-down menu in the "Price Precision" column. Note that this revised price precision will only apply to the participant with whom you have associated it when you are inviting participants.

4. If you want to allow participants to see the currency exchange rates you are defining for your Response Currencies, click the "Publish exchange rates to participants" checkbox. If you check this box, participants will be able to see the Response Currency exchange rates you have defined for all valid Response Currencies.

5. When you have finished associating currencies with participants, continue creating your new RFQ.

What are item attributes, and how do I add them to my RFQ items?

What are item attributes?
When you add an item to an RFQ, you may choose to add one or more **item attributes** to that item. Item attributes define: 1) unique specifications that you set for an RFQ item, and 2) the details that a participant should provide when responding on that RFQ item. Item attributes make your RFQ item more descriptive, and can also be used to ensure that all responses submitted for the item will include specific details not included elsewhere in the item information.

For example, a buyer can create an RFQ to buy a fleet of 12 vehicles for a delivery service. When the buyer adds the item (vehicle) to the RFQ, the buyer can add an item attribute called "mileage" to specify that the quote item must have fewer than 12,000 miles on the odometer. While the buyer could enter this information in the RFQ item description, using an item attribute to define this specification calls attention to the specification. In addition, if the buyer marks this item attribute as a *required* attribute, then suppliers will be required to enter the mileage of any quote item.

How do I add item attributes to my RFQ items?
You can add multiple item attributes to any item or items you include in your RFQ. The item attribute(s) you add to an item will be added to that item only, and will not apply to all items in the RFQ.

You can add item attributes when you add items to your RFQ online, or when you upload your RFQ items from a spreadsheet created offline. If you, your TransportMAX Company Administrator, or your TransportMAX Operator have created attribute lists for your company's use, you can also add item attributes from a predefined attribute list. Note that if you use an RFQ template to create your RFQ, the template may include default item attributes; you can choose delete, edit, or add to the template's item attributes as necessary.

Adding Item Attributes Online

1. Create a new RFQ. For more information about creating RFQs, see "How do I create a new RFQ?"

2. After you enter your RFQ item information, click the "Enter New Item Attributes" link.

   Note: When you select a category for your RFQ item, any category attributes included with that category will be defaulted into the "Item Attribute" field, and the category attributes will be added to your RFQ item as item attributes. Also, if you add items to your RFQ from the TransportMAX catalog, the category attributes (if any) of those items will be copied from the catalog with the items, and will appear as item attributes in the "Item Attributes" field. You can edit or delete any of these item attributes by selecting an attribute and clicking the appropriate button.

3. On the **Add Item Attributes** page, enter your item attribute information in the appropriate fields. Note that some of the information is required, and some is optional. Required fields are marked with an asterisk (*):

   - ***Attribute**
     Enter a name for your item attribute (for example: "Mileage"; "PPM Defect Rate"; "Grade"; etc.).

   - **Response**
     Select a response from the drop-down menu at the "Response" field. If you want this item attribute to be *required* (all participants must enter a value for this attribute when responding), select "Required." If you want this item attribute to be *optional* (participants are not required to enter a value for this attribute when

responding), select "Optional." If you want this item attribute to be *displayed* to the participant without allowing any participant response, select "Display Only."

- **Value Type**
  From the drop-down menu at the "Value Type" field, select the type of value that participants should enter for this attribute when responding. Participants may enter *Text* (letters/words, digits, etc.), *Number* (digits with decimals allowed), *Date* (numbers in date format), or *URL* (using the format http://www.oracle.com). The value type you select also governs the value you can enter in the "Transaction Value" field. **Note:** *Text* is the most flexible value type. If you select *Text*, participants will be allowed to enter letters as well as numbers. If you select *Numbers*, participants will only be allowed to enter digits; if you select *Dates*, users will only be allowed to enter numbers in date format.

- **Transaction Value**
  If desired, set your RFQ item specifications by entering a target value for the item in the "Transaction Value" field (for example: "Fewer than twelve thousand miles per vehicle"; "Fewer than eight defects per million parts manufactured"; etc.).

- **Display Value to Participants**
  If you want participants to see the Transaction Value, select "Yes" from the drop-down menu at the "Display Value" field. If you do not want participants to see the Transaction Value, select "No" from the drop-down menu at the "Display Value" field.

4. When you have finished entering your item attribute information you can:

   - Click the "Add Another" button to add another item attribute. Repeat Step 3 above for the new attribute(s). The item attribute(s) you have added to this RFQ item will appear on the **Add Item Attributes** page under "Pending Attributes."

   - Delete the existing attribute(s) by clicking on the "Trash Can" icon to the right of the attribute(s).

   - Click the "Done" button to return to the **Item Information** page. Your list of item attributes will appear on the **Item Information** page.

5. Continue through the steps of creating your RFQ.

Adding Item Attributes in a Spreadsheet

1. Create a new RFQ. For more information about creating RFQs, see "How do I create a new RFQ?"

2. When you are ready to add items to your RFQ, click the "Load Items from Spreadsheet" link.

3. To add item attributes to your spreadsheet prior to bulk load:

   o Add your item attribute information into the *Attribute, Response, Attribute Value Type, Transaction Value,* and *Transaction Value Displayed*

columns (see Step 3 above for more information on each of these columns). If you choose to enter an item attribute on your spreadsheet, all item attribute fields except *Transaction Value* and *Display Transaction Value* are required (you must enter item attribute information for the required fields).

- If you want to add another item attribute(s), copy the following set of columns on the spreadsheet: *Attribute, Response, Attribute Value Type, Transaction Value,* and *Transaction Value Displayed*. Paste the set of five columns to the right of the existing set of item attribute columns (be sure to paste the set of columns into the spreadsheet *before* the end of line delimiter). You can add multiple item attributes in this fashion.

- Enter your item attribute information into the set of columns. Though you have added new columns to the spreadsheet, you are not required to enter item attribute information for every item on the spreadsheet.

4. Continue your RFQ item bulk load.

Adding Item Attributes from a Predefined Attribute List

Attribute lists are named groups of item attributes that apply to items in a RFQ. If you, your TransportMAX Company Administrator, or your TransportMAX Operator have created one or more attribute lists, you can search for and apply an attribute list to your RFQ item.

1. Create a new RFQ.

2. After you enter your RFQ item information, click the "Apply Predefined Attribute Lists" link.

3. Search for the attribute list you want to apply by entering your search criteria into any or all of the "Attribute List Search" fields on the **Apply Attribute Lists** page, then clicking the "Go" button. The search fields include:

   - **List Name**
     If you know the name of the attribute list for which you're searching, enter it in the "List Name" field. You can also enter any part of the attribute list name into the "List Name" field to search for all attribute lists that contain your search term anywhere in the list name. For example, a List Name search on the letters "trans" would return the list named "**Trans**portation Attributes."

   - **Description**
     You can enter any search term that describes the attribute list for which you're searching. You will see all attribute lists that contain your search term anywhere in the attribute list description. For example, a Description search on the term "transport" would return the attribute list that includes the description "Attributes for U.S. **transport**ation RFQs."

   - **Attribute Name**
     You can enter the name of any attribute that appears on the attribute list

for which you're searching. You will see all attribute lists that include the attribute you have entered in the "Attribute Name" field.

4. In the "Attribute List Search Results" field, select the radio button to the left of the attribute list you want to apply, then click the "Apply to Item" button. The attributes of the list you have selected will be applied to your RFQ item on the **Item Information** page.

5. To edit any attribute that appears on the attribute list, select the radio button to the left of the attribute, then click the "Edit" button. Edit your item attribute information as appropriate, then click the "OK" button. Note: Your edits will only apply to the attribute added to your RFQ item. Your edits will not apply to the attribute list.

6. To delete any item that appears on the attribute list, select the radio button to the left of the attribute, then click the "Delete" button. Note: Your deletion will only apply to the attribute added to your RFQ item. You will not delete the attribute from the attribute list.

7. When you have finished adding item attributes from a predefined attribute list, you can choose to enter additional item attributes online, apply another predefined attribute list, or continue through the steps of creating a new RFQ.

How do I create and edit reusable attribute lists?

You can create **attribute lists** to include on your RFQ templates or to use when creating any new RFQ. Attribute lists are named groups of item attributes (item characteristics) that apply to items in a RFQ. If you include an attribute list on a RFQ template, the attributes on the list will apply to *all* items added to a RFQ created with that template (though the RFQ owner who is using the template can edit and remove attributes as appropriate).

The sections below describe how to create attribute lists and how to edit attribute lists that you have created.

Creating a New Attribute List
To create a new attribute list:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Negotiations" tab, then click "RFQs" or "RFQs" in the task bar directly below the tabs.

3. Click the "Reusable Attribute Lists" link.

4. On the **Attribute Lists** page, click the "Create New List" link.

5. On the **Create Attribute List** page, enter a *Name* and brief *Description* for your attribute list. Choose the Status (either "Active" or "Inactive") of your attribute list from the drop-down menu at the "Status" field. An "Active" list can be used immediately; an "Inactive" list will be stored in TransportMAX, but will not be available for use unless you edit the list and change its status to "Active."

6. To add attributes to your attribute list, click the "Add Attributes" link on the **Create Attribute List** page. (Note: An attribute list must include at least one item attribute.)

7. On the **Add Attributes** page, enter your attribute information in the appropriate fields. Note that some of the information is required, and some is optional. Required fields are marked with an asterisk (*):

   - ***Attribute**
     Enter a name for your item attribute (for example: "Mileage"; "PPM Defect Rate"; "Grade"; etc.).

   - **Quote Response**
     Select a response from the drop-down menu at the "Quote Response" field. If you want this item attribute to be *required* (all participants must enter a value for this attribute when responding), select "Required." If you want this item attribute to be *optional* (participants are not required to enter a value for this attribute when responding), select "Optional." If you want this item attribute to be *displayed* to the participants without allowing any participant response, select "Display Only."

   - **Value Type**
     From the drop-down menu at the "Value Type" field, select the type of value that participants should enter for this attribute when responding. Participants may enter *Text* (letters/words, digits, etc.), *Number* (digits with decimals allowed), *Date* (numbers in date format), or *URL* (using the format http://www.oracle.com). The value type you select also governs the value you can enter in the "Transaction Value" field.
     Note: *Text* is the most flexible value type. If you select *Text*, participants will be allowed to enter letters as well as numbers. If you select *Numbers*, participants will only be allowed to enter digits; if you select *Dates*, users will only be allowed to enter numbers in date format.

   - **RFQ Value**
     If desired, set your RFQ item specifications by entering a target value for the item in the "RFQ Value" field (for example: "Fewer than twelve thousand miles per vehicle"; "Fewer than eight defects per million parts manufactured"; etc.).

   - **Display Value to Participants**
     If you want participants to see the Transaction Value, select "Yes" from the drop-down menu at the "Display Value" field. If you do not want participants to see the Transaction Value, select "No" from the drop-down menu at the "Display Value" field.

   When you have finished entering your item attribute information, click the "Add Another" button to add another new item attribute, or click the "OK" button to add your current item attribute to your attribute list and return to the **Create Attribute List** page.

8. On the **Create Attribute List** page, review your attribute list name, description, status, and attributes. When you are satisfied with your attribute list, click the "Submit" button.

Editing Attribute Lists
To edit an attribute list you have created:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Negotiations" tab, then click "RFQs" or "RFQs" in the task bar directly below the tabs.

3. Click the "Reusable Attribute Lists" link.

4. Search for the attribute list you want to edit by entering your search criteria into any or all of the "Attribute List Search" fields on the **Attribute Lists** page, then clicking the "Go" button. The search fields include:

    - **List Name**
      If you know the name of the attribute list for which you're searching, enter it in the "List Name" field. You can also enter any part of the attribute list name into the "List Name" field to search for all attribute lists that contain your search term anywhere in the list name. For example, a List Name search on the letters "trans" would return the list named "**Trans**portation Attributes."

    - **Description**
      You can enter any search term that describes the attribute list for which you're searching. You will see all attribute lists that contain your search term anywhere in the attribute list description. For example, a Description search on the term "transport" would return the attribute list that includes the description "Attributes for U.S. **transport**ation RFQs."

    - **List Status**
      You can search for attribute lists in "Active," "Inactive," or "Any" status. From the drop-down menu at the "List Status" field, select the status of the list for which you're searching.

    - **Attribute**
      You can enter the name of any item attribute that appears on the attribute list for which you're searching. You will see all attribute lists that include the item attribute you have entered in the "Attribute Name" field.

5. Select the radio button to the left of the attribute list you want to edit, then click the "Edit" button.

6. On the **Edit Attribute List** page, edit the attribute list Description and Status as appropriate. Note that you cannot edit the Name of your attribute list.

7. On the **Edit Attribute List** page, you can also add, delete, or edit attributes on your attribute list:

    - To add a new attribute to this list, click the "Add Attributes" link, then enter your new attribute information. When you have finished entering your item attribute information, click the "Add Another" button to add

another new item attribute, or click the "OK" button to add your current item attribute to your attribute list and return to the **Edit Attribute List** page.

- To delete an existing attribute from this list, select the radio button to the left of the attribute, then click the "Delete" button.

- To edit an existing attribute on this list, select the radio button to the left of the attribute, then click the "Edit" button. Edit the attribute information as appropriate. When you have finished editing your attribute information, click the "OK" button to return to the **Edit Attribute List** page.

8. When you have finished editing your attribute list Description, Status, and attributes, click the "Apply Changes" button to submit your changes. To cancel **all** edits you have made to your list, click the "Clear Changes" button

Why would I add item attributes to my RFQ items?

Item attributes make your RFQ item more descriptive, and can also be used to ensure that all quotes submitted for the item will include specific details not included elsewhere in the item information.

For example, an buyer can create an RFQ to buy a fleet of 12 vehicles for a delivery service. When the buyer adds the item (vehicle) to the RFQ, the buyer can add an item attribute called "mileage" to specify that the quote item must have fewer than 12,000 miles on the odometer. While the buyer could enter this information in the RFQ item description, using an item attribute to define this specification calls attention to the specification. In addition, if the buyer marks this item attribute as a *required* attribute, then suppliers will be required to enter the mileage of any quote item.

Item attributes can also call attention to industry-specific characteristics of your RFQ items. For example, retail industry RFQ items can include such item attributes as "color," "style," and "SKU number." Metal industry RFQ items can include "grade of metal" as an item attribute. Adding these as *required* item attributes that are displayed to suppliers can "customize" your RFQ items to your specific industry.

For additional examples of how to use item attributes, click the "Show Example" links on the **Add Item Attributes** page.

Can I invite additional participants to an RFQ I've already created?

You can add participants to your RFQ at any time before the RFQ close date and time. If you are a TransportMAX Company Administrator, you can also add participants to any RFQ created by a TransportMAX user in your company (prior to the RFQ's close date and time).

To add participants to an RFQ:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to add participants to an RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "View All RFQs" link.

4. Click the radio button to the left of the RFQ to which you want to add participants, then click the "View RFQ" button.

5. Click the "Add Invitees" button.

6. On the **Invite Additional Participants** page, click the "Invite TransportMAX Members" link.

7. On the **Invite TransportMAX Members** page, search for participants (by company name) to invite to the RFQ. You can also browse the Trading Partner Directory by clicking on any letter of the alphabet, or the "Show All" link, above the "Search" fields.

8. Click the checkbox to the left of any participant you want to invite to your RFQ, then click the "Add to Invitees List" button. TransportMAX will ensure that you do not add duplicate participants to your RFQ's Invitees List.

9. Continue searching for additional participants as desired. When you have finished selecting additional participants for your RFQ, click the "Done" button.

10. The additional participants you have selected will be added to your RFQ's Invitees List.

    - All new invitees will see your RFQ on their list of "You're Invited" RFQ invitations.

    - If the RFQ has not yet entered its "preview" period, the additional invitees will receive notifications inviting them to participate in the RFQ. If there is no preview period set for the RFQ, and the RFQ has not yet opened for responses, the additional invitees will receive notifications inviting them to participate in the RFQ.

    - If the RFQ has already opened for preview or for responses, the additional invitees will **not** receive notifications regarding the RFQ.

What are some advanced RFQ strategies I can use?

There are a number of techniques you can use to facilitate the RFQ results you want. When creating your RFQ, you can use Item Attributes to get the specific quote information you need from suppliers. You can also use AutoExtend and Quote Increment/Decrement, Quote Start Price and Target Price, Sealed Quoting, and Quote Items to influence quoting. These techniques are discussed in the sections prior.

Monitoring RFQs

How do I monitor the RFQs I have created?

To monitor the RFQs you have created:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to monitor RFQs.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the left side of the page, click the "View Open RFQs" link to view your open RFQs; click the View All RFQs" link to view *all* of your RFQs. Search for an RFQ you have created.

4. Select the radio button next to any of your RFQs.

    - Click the "View Quote History" button to view the responses you have received for this RFQ. You can also view responses by clicking on the number of responses received for an RFQ.

    - If you have accessed this RFQ via the "View All RFQs" link, you may be able to view a graphical monitor of the RFQ. To view the graphical monitor, click the Graph icon to the right of the RFQ. Select a RFQ item to view, then click the "View Item" button. **Note:** The graphical monitor is not available for **sealed** style RFQs until they are unlocked. Only RFQ owners can view the graphical monitor in **blind** style RFQs.

What are Negotiations "At a Glance"?

The Negotiations "At a Glance" feature allows you quick access to all of the open RFQs in which you are currently participating. The RFQs that appear on your "At a Glance" lists include both the open RFQs that your company owns ("Created By Your Company Name/Owner Name"), as well as the open RFQs to which you have responded.

Only open RFQs will appear on your "At a Glance" list. RFQs that have not yet opened, have closed, or have been canceled will not be displayed.

To use Negotiations At a Glance:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to find the RFQs you've created.

2. Click the "Negotiations" tab.

3. The RFQs in which you are currently participating will appear on the "Negotiations At a Glance" list on the **All Negotiations** page. Click the "More..." link to view a full list of your RFQs.

    - To view an RFQ, click on its number.

    - To view the graphical monitor of an RFQ, click the Graph icon to the right of the RFQ. Select a RFQ item to view, then click the "View Item" button.
      Note: The graphical monitor is not available for **sealed** style RFQs until they are unlocked. Only RFQ owners can view the graphical monitor in **blind** style RFQs.

4. To view your open RFQs or quotes, click "RFQ" in the task bar directly below the tabs.

5. Your RFQs will appear on the "Negotiations At a Glance" list on the **RFQs** home page. Click the "More..." link to view a full list of your RFQs.

    - To view an RFQ, click on its number.

    - To view the graphical monitor of an RFQ, click the Graph icon to the right of the RFQ. Select a RFQ item to view, then click the "View Item" button.
      Note: The graphical monitor is not available for **sealed** style RFQs. Only RFQ owners can view the graphical monitor in **blind** style RFQs.

How do I extend an RFQ that is in progress?

You can extend an RFQ in progress beyond its scheduled close date and time only if your RFQ's quote controls (which you define when you create the RFQ) are set to allow manual extension of the RFQ. To allow your RFQ to be extended beyond its scheduled close date, select "RFQ can be manually extended while open for quoting" on the **Select Quote Controls** page.

Note: You cannot manually extend your RFQ after it has closed for quoting, nor can you manually extend an RFQ after its first AutoExtension has been triggered.

To extend your RFQ beyond its scheduled close date and time:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to extend an RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the **RFQs** home page, click "View All RFQs."

4. Select the radio button to the left of the RFQ you want to extend, then click the "View RFQ" button.

5. On the **RFQ <Number>** page, click the "Extend RFQ" button.

6. On the **Extend RFQ** page, enter an extended close date and time for your RFQ.

7. Click the "Submit" button. An "RFQ Extended" notification will be sent to all suppliers and invitees in the RFQ.

If, when creating this RFQ, you entered an award date, need-by date, and/or long-term agreement dates, these dates will also be extended the by same number of days that you extend your RFQ *if* the dates are scheduled to occur before your extended close date. For example, if your RFQ includes a January 15 close date and a January 20 award date, and you extend that RFQ for 7 days, your new close date is January 22, and your new award date is January 27. However, if you extend that RFQ for only 3 days, your new close date is January 18, and your award date remains January 20.

How do I modify my RFQ's AutoExtend settings while the RFQ is in progress?

You can initially set your RFQ's AutoExtend settings when you are defining the RFQ's Quote Controls. Quote Controls are defined when you create a new RFQ.

However, even if you *do not* set AutoExtend settings when you are creating your RFQ, you are still allowed to **enable AutoExtend** after the RFQ opens for quoting. If you *do* set AutoExtend settings when you are creating your RFQ, you can **modify** any of those settings after the RFQ opens for quoting. When setting your RFQ's Quote Controls, you must select "RFQ can be manually extended while open for quoting" in order to enable AutoExtend or modify AutoExtend after the RFQ opens.

If the RFQ enters AutoExtend mode, you can change the number of times that the RFQ can AutoExtend, but you cannot change any of the RFQ's other AutoExtend settings. You *cannot* set up or modify AutoExtend settings for an RFQ that is in a preview period or has closed for quoting.

To set up or modify your RFQ's AutoExtend settings:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to modify AutoExtend in a Buyer's RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the **RFQs** home page, click "View Open RFQs" or "View All RFQs."

4. Select the radio button to the left of the RFQ you want to extend, then click the "View RFQ" button.

5. On the **View RFQ** page, click the "Extend RFQ" button.

6. On the **Extend RFQ** page, review your current AutoExtend settings (if any). You can also review and extend your RFQ's scheduled close date and time.

7. To change your AutoExtend settings, click the "Change AutoExtend Settings" link. On the **Change AutoExtend Settings** page, you can revise any or all of the following AutoExtend settings:

    - Items you want to AutoExtend (AutoExtend **all** items, or only those that receive quotes during the AutoExtend period)
    - Number of AutoExtensions allowed (can be increased, but not decreased)
    - Length of each AutoExtension
    - Start time of each AutoExtension (at the scheduled RFQ close time, or upon receipt of a new winning quote)

    For more information about AutoExtend settings, see "What are Quote Controls, and how do I set them?"

8. When you have finished modifying your RFQ's AutoExtend settings, click the "OK" button.

How do I initiate a new round of quoting on my RFQ?

After an RFQ you have created has closed for quoting, you can initiate a new round of quoting on the same RFQ (provided that, while creating the RFQ, you set the RFQ's quote controls to allow multiple rounds of quoting). You might decide to initiate a new round of quoting in your RFQ if the quoting is not proceeding in your favor, or if you want to add to or change certain details of the RFQ.

After you initiate a new round of quoting in an RFQ, none of the quotes submitted on the RFQ in the previous round are available for awarding.

The sections below explain how to allow for multiple rounds of quoting, how and when you can initiate a new round of quoting, how to update the details of your RFQ prior to a new round of quoting, and how to monitor a new round of quoting.

Allowing for Multiple Rounds of Quoting
In order to initiate a new round of quoting, your RFQ's quote controls (which you define when you create the RFQ) must be set to allow multiple rounds of quoting.

To allow for multiple rounds of quoting in your RFQ, select "Yes - this RFQ may go into multiple rounds of quoting" on the **Select Quote Controls** page.

Initiating a New Round of Quoting
You can only initiate a new round of quoting after the current round has closed. Before you can initiate a new round of quoting, you must either wait until the RFQ reaches its close date and time, or you must manually close the RFQ early. You can close an RFQ early provided that, while creating the RFQ, you set the RFQ's quote controls to allow early close of the RFQ. After the RFQ has closed, you can initiate a new round of quoting from the **View RFQs** or the **Award RFQs** page:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to initiate a new round of quoting in an RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the **RFQs** home page, select **one** of two links:

    - Click the "View All RFQs" link. Select the radio button to the left of the RFQ in which you want to initiate a new round of quoting, then click the "View RFQ" button. On the **View RFQ** page, click the "Start New Round" button.

    - Click the "Award Business" link. Select the radio button to the left of the RFQ in which you want to initiate a new round of quoting, then click the "Start New Round" button.

4. You will receive a warning advising you that none of the quotes received in the current round of quoting will be available for award after you initiate a new round of quoting. If you accept these terms, click the "Yes" button.

5. You will link to the **Start New Quoting Round** page, where you can update your RFQ's details.

Updating Your RFQ's Details
On the **Start New Quoting Round** page, you can update any of the following RFQ details for the new round of quoting (*indicates a field that **must** be updated prior to the new quoting round):

- ***RFQ Open Date**
  You must enter a date and time at which you want the new round of quoting to begin. To open the new round immediately, click the "Open the RFQ for quoting immediately" checkbox.

- **RFQ Preview Date**
  For RFQs opening in the future (not immediately), you can choose to enter a date and time (prior to the open date and time) at which the RFQ will be available for preview to all eligible RFQ participants. You can also choose to publish the RFQ for preview immediately by clicking the "Publish RFQ for preview immediately" checkbox.

- ***RFQ Close Date**
  You must enter a date and time at which the RFQ will close for quoting.

- **Suppliers List**
  If you invited suppliers to participate in the previous round of quoting, those suppliers will be automatically added to the suppliers list for the new round of quoting. In addition, all suppliers who placed quotes in the previous round of quoting will be automatically added to the suppliers list for the new round of quoting. To remove a supplier from the suppliers list for the new round of quoting, select the checkbox to the left of the supplier's name, then click the "Delete" button.

  You can invite additional suppliers to participate in the new round of quoting in any of the following three ways:

  - **Invite TransportMAX Members**
    Click the "Invite TransportMAX Members" link to search for and send invitations to suppliers who are members of TransportMAX.

  - **Invite Non-Members**
    Click the "Invite Non-Members" link to send invitations to trading partners who are not yet members of TransportMAX. Non-members must register on TransportMAX before they can participate in the RFQ.

  - **Apply Pre-Defined Suppliers List**
    Click the "Apply Pre-Defined Suppliers List" link to apply a suppliers list to this round of quoting.

- **Note to Suppliers**
  You can choose to add a text note about this RFQ to the suppliers in the new round of quoting.

- **Add Attachments**
  You can choose to include an attachment to this RFQ. Attachments contain additional descriptive information about your RFQ. The file size limit for attachments is 4 MB. For attachment files larger than 4 MB, post the file to the Internet site of your choice, and include the URL at which the attachment can be accessed. Include the full URL, for example: http://www.transportmax.com.

When you have finished updating your RFQ's details on the **Start New Quoting Round** page, click the "Continue" button. (To cancel the new round of quoting, click the "Cancel" button.) Review your updated information, then click the "Submit" button.

Monitoring a New Round of Quoting
You can monitor the action in the new round of quoting in the same way you monitor all quoting action in your RFQs.

How do I close an RFQ before the scheduled close date and time?

You can close an RFQ before its scheduled close date and time only if your RFQ's quote controls (which you define when you create the RFQ) are set to allow an early close of the RFQ. To allow your RFQ to be closed early, select "RFQ can be manually closed before the close date" on the **Select Quote Controls** page.

Note: You cannot manually close your RFQ after its first AutoExtension has been triggered.

To close your RFQ before its scheduled close date and time:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to close an RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the **RFQs** home page, click "View Open RFQs" or "View All RFQs."

4. Select the radio button to the left of the RFQ you want to close, then click the "View RFQ" button.

5. On the **RFQ <Number>** page, click the "Close Early" button.

6. On the **Close Early** page, enter the date and time at which you want to close the RFQ. To close the RFQ immediately, click the "Close RFQ Immediately" checkbox.

7. If desired, enter a note to the suppliers in this RFQ regarding the early close of the RFQ. The note will be included in the "RFQ Closed" notification that will be sent to all suppliers and invitees in the RFQ.

8. Click the "Submit" button.

How do I cancel an RFQ?

To cancel an RFQ that you have published:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the **RFQs** home page, click "View Open RFQs" (if the RFQ you want to cancel is open for bidding) or "View All RFQs" (if the RFQ you want to cancel is in a preview period).

4. Find the RFQ you want to cancel and select the radio button next to the RFQ number. Click the "Cancel" button to cancel the RFQ.

5. You can enter a text note to suppliers explaining why you are canceling the RFQ, then click the "Submit" button on the **Cancel RFQ** page.

You cannot cancel an RFQ that has already closed for quoting. You are not required, however, to select a winning quote for any RFQ. **Note:** Any TransportMAX user in your company who has the appropriate Job Function can cancel your RFQ.

Awarding Business in Negotiations

How do I view the quotes I have received for an RFQ?

You can view the quotes you have received for an RFQ while the RFQ is still in progress (open), or after the RFQ has closed for quoting.

To view quotes for an RFQ that is still in progress (open):

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to view quotes in an RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the **RFQs** home page, click the "View Open RFQs" link.

4. Select the radio button next to the RFQ in which you want to view quotes, then click the "View Quote History" button. You can also view the quotes received by clicking on the number of quotes received for the RFQ (in the "Quotes" column).

5. All active quotes for the RFQ will be listed. To view individual lines in a quote, select a quote and click the "View Quote Items" button.

To view quotes for an RFQ that has closed:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to view quotes in an RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. On the **RFQs** home page, click the "View All RFQs" link.

4. Select the radio button next to the RFQ in which you want to view quotes, then click the "View Quote History" button. You can also view the quotes received by clicking on the number of quotes received for the RFQ (in the "Quotes" column).

5. All quotes for the RFQ will be listed. To view individual lines in a quote, select a quote and click the "View Quote Items" button.

How do I unlock and unseal a sealed RFQ?

When you create a new RFQ, you can choose to create a **sealed** RFQ. In a sealed RFQ, you (the buyer) cannot see the quotes (or award the RFQ) until you unlock the RFQ. In addition, suppliers in the RFQ cannot see the other suppliers' quotes until you unseal the RFQ (though supplier identity will never be revealed to the suppliers in an RFQ). An RFQ can only be unlocked and unsealed after the RFQ close date and time.

Note: You will always be able to unlock and unseal an RFQ you have created. In addition, other TransportMAX users from your company who have the appropriate Job Functions will also be able to unlock and unseal your RFQ.

The sections below provide additional information about viewing your sealed RFQs and unlocking and unsealing a sealed RFQ.

To view your sealed RFQs:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to view sealed Buyer RFQs.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. To view your sealed RFQs that are still open for quoting, click the "View Open RFQs" link on the left side of the page. Your open, sealed RFQs will be listed with all of your current open RFQs.

4. To view your sealed RFQs that have closed for quoting, click the "Manage Sealed RFQs" link on the left side of the page. Only your closed, sealed RFQs are listed on the **Sealed RFQs** page.

5. To view the quotes in a sealed RFQ and to award a sealed RFQ, you must unlock the quotes. You can also choose to unseal the quotes (this will allow suppliers in the RFQ to see the quotes).

To unlock and unseal an RFQ:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to view sealed Buyer RFQs.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "Manage Sealed RFQs" link on the left side of the page. Your closed, sealed RFQs are listed on the **Sealed RFQs** page.

4. To unlock a sealed RFQ (this will allow you to see the quotes, but will not publish the quotes to the suppliers in the RFQ), click the "Unlock" button of any sealed RFQ. You will receive a confirmation that you have unlocked the RFQ. On the **Confirmation** page, click "Return to Sealed RFQs."

5. If you want to unseal the RFQ you have just unlocked, click the "Unseal" button for that RFQ. You will receive a confirmation that you have unsealed the RFQ, which allows the RFQ's suppliers to see the quotes (but not supplier identity). On the **Confirmation** page, click "Return to Sealed RFQs."

6. To view the quotes in the RFQ you have unlocked, click on the eyeglasses icon in the "View Quote History" column of the "Sealed Quotes" table (or click the number of quotes received for the RFQ in the "Quotes" column of the "Sealed Quotes" table). On the **Quote History** page, select the radio button to the left of a quote you want to view, then click the "View Quote Items" button.

7. To award a sealed RFQ that you have unlocked, click the "Award Business" link on the **RFQs** home page. Select the radio button to the left of the RFQ you want to award, then click the "Award by Item" button.

How do I download the quotes I have received for an RFQ?

You can download all of the quotes you have received for an RFQ into a spreadsheet to view offline. This is especially useful if you have received a large number of quotes and want to compare the quotes offline.

To download your quotes, do the following:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to download quotes you have received on a Buyer's RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "Award Business" link.

4. Select the radio button to the left of the RFQ for which you want to download quotes, then click the "Export Quotes" button.

5. On the **Export Quotes** page, you can download one or both of two files:

    - **Download Quotes**
      This is a file that contains all of the quotes you have received for your selected RFQ. The column headings indicate specific quote information for all of the quotes on the RFQ. You can open or save the WinZip file to the drive/location of your choice.

    - **Download Instructions**
      Instructions for reviewing the quotes you have downloaded. You can open or save the WinZip file to the drive/location of your choice. **Note:** If you have never exported quotes from TransportMAX, it is strongly recommended that you download and read this Instructions file.

6. Follow the directions in the Instructions file to review the spreadsheet of quotes you have received on this RFQ.

How do I view quote attachments?

Suppliers can choose to include quote attachments (also called quote documents) with their quotes. Quote attachments provide you (the buyer) with additional information about a quote.

To view quote attachments:

1. Access the Marketplace Buying application (on the TransportMAX home page, click the "Marketplace Buying" link) to view quote attachments in your Buyer's RFQs.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "View All RFQs" link. **Note:** If the RFQ in which you want to view quote attachments is still open for quoting, you can click the "View Open RFQs" link.

4. Select the radio button to the left of the RFQ in which you want to view quote attachments. Click the "View Quote History" button.

5. On the **Quote History** page, select the radio button to the left of the quote for which you want to view quote attachments. Click the "View Quote Items" button. You will link to the **Quote Details** page.

6. Suppliers can include attachments to the **quote** (at the quote header level) and/or to the **quote item(s)** (at the item level).

- To view an attachment to a **quote**: On the **Quote Details** page, look for an attachment in the "Quote Details" section. If an attachment is included with this quote, click the "Attachment" link.

- To view an attachment to a **quote item**: In the "Items" table on the **Quote Details** page, locate the item for which you want to view an attachment. Click the item's "View" link in the "Details" column. If an attachment is included with this item, click the "Attachment" link.

How do I disqualify responses I receive for an RFQ?

You may receive responses on your RFQs that you wish to disqualify, perhaps because the responses do not meet your target prices, dates, locations, or other criteria for your RFQ. Whenever you disqualify a response, you must enter a valid reason for the disqualification.

To disqualify a response:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to view responses on your RFQs.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "View Open RFQs" link.

4. Locate an RFQ that contains responses you want to view. Select the radio button next to the RFQ, then click the "View Quote History" button. You can also view the responses received by clicking on the number of responses received for the RFQ (in the "Quotes" column).

5. All responses for the RFQ will be listed. Select the radio button to the left of the response you want to disqualify, then click the "Disqualify Quote" button.

6. On the **Disqualify** page, enter a text note to the participant to explain why you are disqualifying the response. Click the "Done" button.

7. You will see a confirmation page indicating that the response has been disqualified.

8. The participant will be notified that the response has been disqualified, and will have the opportunity to submit another response (if the RFQ is still open).

Note that when you disqualify a response, you are disqualifying an *entire* response, not an individual line in the response.

How do I select a winning quote or quotes?

To select a winning quote or quotes for an RFQ, you must view and compare all of the quotes you have received for an RFQ. You can either view the quotes received online, or you can download the quotes received into a spreadsheet to view offline.

The criteria you use to select a winning quote or quotes are entirely up to you. "Quote Price" and "Ship Date" are two of the major criteria against which quotes are measured; therefore, TransportMAX will always highlight the lowest price and earliest promise date as the "best quote." However, RFQ owners must ultimately select their own criteria for determining the winning quote.

Once you have selected a winning quote(s), you can award your RFQ.

How do I award business in an RFQ?

To award business in an RFQ, you must pick a winning quote(s) for your RFQ. When you award business in an RFQ, you award by **item**, not by a single **supplier**. An RFQ composed of many items might have several winning suppliers.

Note: The RFQ must be closed for responses before you can award business.

To award an RFQ:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link) to award an RFQ.

2. Click the "Negotiations" tab, then click "RFQs" in the task bar directly below the tabs.

3. Click the "Award Business" link.

4. On the **Award** page, select the radio button to the left of the RFQ you want to award, then click the "Award by Item" button. You will receive a reminder that you cannot initiate a new round of quoting/quoting on this RFQ once you have submitted an award decision.

5. Your RFQ items will be listed (one item per line) on the **Award by Item** page. The number of quotes or quotes received for each RFQ item will appear in the "Quotes" or "Quotes" column. To review and compare all quotes received for any item, click on the number of quotes received for that item.

   The **Award by Item** page also provides:

   - **Awarded Items in RFQ**
     This is the number of previously awarded items in the RFQ.

   - **No Quote Items in RFQ**
     This is the number of RFQ items that have received no quotes.

6. On the **Award by Item** page, select the radio button to the left of the line number you want to award, then click the "Pick Winning Quotes" button.

7. On the **Pick Winning Quotes** page, review and compare the quotes you have received for this item. Click on any Quote Number in the "Quote" column to see the details of a quote, including quote notes, attachments, and supplier contact information.

8. When you are ready to award the item:

   - Select a winning quote or quotes. You can award partial quantities of the item to several suppliers. You are not required to award the full quantity of the RFQ item (for example, you may have created an RFQ to buy 24 items, but decide to award business for only 20 of those items).

   - Enter the award quantity into the line(s) of the winning quote(s). For example, in an RFQ of 24 items, you may choose to award 12 items to Supplier A, and 8 items to Supplier B. The remaining four quote items would not be awarded.

- Click the "Award" button.

You may also choose not to award this RFQ item. If so, click the "No Award" button. Enter a text note to the participants in the RFQ, then click the "Submit Award" button.

9. If you have awarded business in the RFQ, review your award on the **Award** page. On this page, you can also:

    - Update the award quantity
    - Enter a note to the winning supplier(s)
    - Enter a note to the rejected supplier(s)

    Click the "Submit Award" button when you are done.
10. If there are additional lines to be awarded in the RFQ, you will return to the **Award by Item** page.

    - Repeat Steps 5 through 9 above until you have no lines left to award.
    - A running total at the top of the **Award by Item** page will tell you how many items have been awarded in the RFQ, and how many items remain to be awarded.

11. When you have finished awarding all lines, click the "Complete RFQ" button on the **Award by Item** page to reject any outstanding quotes and to notify all participants of your award decisions.

General Negotiation Questions

What is the difference between "quote start price" and "target price"?

When creating a new RFQ, the RFQ owner has the option to set a "quote start price" and "target price" for every item in the RFQ. The **quote start price** is the price at which quoting for one unit of the item must start. The **target price** is the price the buyer hopes to pay for one unit of the RFQ item. If desired, the buyer can elect to display the target price to suppliers.

Quote start price and **target price** are both optional values; RFQ owners are not required to set either price for any RFQ item.

Can two people from the same company quote on the same RFQ?

Yes. All registered TransportMAX users in a company can quote in the same RFQ, provided that:

1. Their TransportMAX Company Administrator has granted them the appropriate Job Function, and

2. The RFQ in which they are quoting is not owned by their company. A supplier may not quote on an RFQ owned by his/her company.

Can I respond to a RFQ created by someone in my company?

No. Your company owns all RFQs created by your company's TransportMAX users. An RFQ participant may not respond to a RFQ owned by his/her company.

If my RFQ is open to all TransportMAX members, why would I invite specific suppliers to participate?

If, while setting your RFQ's quote controls, you set your RFQ to be open to all registered TransportMAX members, then you are not *required* to send RFQ invitations to any suppliers. However, you might want to send an RFQ invitation to a specific supplier or suppliers to increase those suppliers' awareness of your RFQ. When you invite a specific supplier to participate in your RFQ, that supplier receives an e-mail notification inviting the supplier's participation in your RFQ, and your RFQ will appear in the "You're Invited!" section of that supplier's **RFQ** home page.

Why would an RFQ have "special" terms and conditions?

Any TransportMAX trading partner that publishes RFQs can also include a set of customized Terms and Conditions that govern its RFQs. The trading partner's TransportMAX Company Administrator controls these customized Terms and Conditions.

CHAPTER 5: GENERATING REPORTS

Introduction to Marketplace Intelligence

What is Marketplace Intelligence?

Marketplace Intelligence provides all analytic and transactional reporting for TransportMAX. As buyers and suppliers collaborate and use the marketplace as an e-hub for all procurement-related activities, price savings and efficiencies occur as a result of the increased amount of information flowing through TransportMAX. Marketplace Intelligence promotes the increased efficiency of the marketplace by enabling the transparency and analysis of marketplace transactions:

- Sourcing professionals can assess what they have acquired on TransportMAX, the RFQs they have awarded, the savings realized, any quoting patterns, and other category/item traits.
- TransportMAX Operators or Company Administrators can view catalog transactions on TransportMAX. Reports display the total amount of catalog purchases made on TransportMAX. The catalog transactions are displayed by category, which is useful for assessing progress, trends, and areas for improvement.

Why would I use Marketplace Intelligence reports?

You can use ***Marketplace Intelligence*** reports to:

- Track key purchase and sales indicators on TransportMAX
- Track trends of purchases and sales over time
- Identify potential savings opportunities
- Identify new revenue opportunities
- Identify negotiation opportunities
- Create better targeted sales and marketing campaigns
- Track (at the Operator level) all catalog transactions across TransportMAX
- View summary reports that allow drill-downs to relevant details

You can view the reports online, or export and open the reports in a third-party software application (such as spreadsheet software) where you can analyze and format the numbers at your discretion. For more information on exporting report data, see "How do I export report data to a spreadsheet?"

What are the Marketplace Intelligence reports I can generate?

The following reports can be generated in Marketplace Buying Intelligence, provided you have the appropriate Job Function. Each of the following reports are explained in greater detail in the sections following.

- Buyer's Activity Summary report

- Buyer's Activity - Awarded Quotes Summary report
- Buyer's Activity - Awarded Quotes Detail report
- Buyer's Activity - Accepted Quotations Detail report
- Buyer's Activity - Catalog Sales Summary report
- Buyer's Activity - Catalog Sales Detail report
- Catalog Purchases (by category) report
- Buyers RFQ Savings report

How do I export report data to a spreadsheet?

You can conveniently view report data on screen, but at times, you may want to export the data to a spreadsheet application where you can analyze and format the numbers at your discretion. There are two main steps in this process:

1. Exporting the spreadsheet file
2. Opening the spreadsheet file in a spreadsheet application

In TransportMAX, you can easily export the report data to a tab-delimited file that can be opened in most spreadsheet applications. In a tab-delimited file, the fields are separated by a tab character, but the text has no special formatting characters. These files are very flexible and can be opened by many software applications, including spreadsheet software.

The column headings and data you see in the on screen report are exported to a file that includes such information as the **Exchange Name**, **Company**, **Report Name**, **Time Frame**, and **User Name**.
The "Export to File" feature exports all records for the report, even if only a subset of the records are displayed on screen For example, a report may consist of 180 records, of which only 25 or 50 are shown on the on screen page. However, when the results are exported, all 180 records are exported to the spreadsheet file.

Viewing transactions in all currencies:
When you view transactions for a selected currency in an on screen report, only transactions for that selected currency are displayed. However, if you want to view all transactions completed in all currencies, you can export the report data to a spreadsheet. In the spreadsheet, transactions for all currencies, including the selected currency and the currency code, are displayed.

To export report data to a spreadsheet:

1. Generate the Marketplace Intelligence report of your choice. For a list of available reports, see "What are the Marketplace Intelligence reports I can generate?"
2. After you have generated your report, click on the "Export to Spreadsheet" button located on the bottom of the report page.
3. You will be prompted to save the file. (If you see an "Unknown File Type" window, click the "Save File..." button.) Save the file to the drive/location of your choice.

The report data is saved with the default file name of the report. For example, the default file name for the **Catalog Sales** page is named "Catalog Sales."

To open the spreadsheet file in a spreadsheet application:

1. Once the file is saved, you can open the file in most spreadsheet applications, such as Microsoft Excel:

    - To quickly open the file in Excel, double-click the spreadsheet file. This launches the application and displays the selected spreadsheet file.

    - Alternately, you can start your spreadsheet software, and open the spreadsheet file in the application:

        - When you open the file, the spreadsheet software may use a "Wizard" that displays the steps to open the file. For example, in Excel, the Text Import Wizard asks you to choose the file type that describes your data (Delimited or Fixed Width).

        - Select "Delimited." You will then be asked to set delimiters for your data.

        - Choose "Tab." Do not change the tab appearance in the file.

    Note: If you cannot find the spreadsheet file when you use the "Open" dialog box of the spreadsheet application, make sure that you are pointing to the correct directory, and set the "File Type" in the dialog box to "All files."
2. Each row in the spreadsheet provides detailed information about transactions that your company has performed on TransportMAX.

Why can't I see the "Intelligence" tab in TransportMAX?

All TransportMAX features are controlled by ***function security***. Function security means that TransportMAX features can only be used by those TransportMAX users who have been allowed access to these features. Your TransportMAX Company Administrator controls function security by assigning Job Functions to users. Your Job Function assignments determine which TransportMAX features you can use.

If you cannot access a specific page, link, task bar option, or other feature of TransportMAX, then you have not been assigned a Job Function that will allow you to use that feature. Contact your TransportMAX Company Administrator to request additional Job Function assignments.

Types of Buyers Reports

What is the Buyer's Activity Summary report?

The ***Buyer's Activity Summary*** report displays the quantity and volume of purchase transactions by trading partner and transaction type. This report provides a summary view of all purchases completed on TransportMAX. You can drill into supporting reports from the Buyer's Activity Summary.

To run the Buyer's Activity Summary report:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Intelligence" tab.

3. Click "Buyer's Activity Summary" below the "Marketplace Summary" heading.

4. Enter your search criteria into the appropriate fields, then click the "Go" button. There are four search criteria that can be entered for this report (* indicates a required field):

    - ***From and Through Date**
      Enter a date range for extracting and summarizing transactions.

    - **Currency**
      Select the currency of interest. If a currency is not selected, the report will default to the user's currency.

    - **Category**
      Select the category of interest using the "Flashlight" icon to the right of the field. If a category is not selected the report will default to "All." **Note:** When entering a category search parameter, the report will reflect only TransportMAX hosted catalog item categories.

    - **Trading Partner**
      Select the Trading Partner of interest using the "Flashlight" icon to the right of the field. If a Trading Partner is not selected, the report will default to "All."

5. The report will be displayed directly below the search criteria.

6. Click the "Show Chart" for a graphical representation of the report, if desired. Click "Hide" to hide the Chart.

7. Click "Export to Spreadsheet" to download the report, if desired. For more information about exporting your report to a spreadsheet, see "How do I export report data to a spreadsheet?"

There are three detail reports that can be accessed from the Buyer's Activity Summary report:

- **Buyer's Activity - Catalog Purchases Summary Report**
  Click on any number under the Catalog column to execute the Buyer's Activity - Catalog Purchases Summary Report for the selected Trading Partner. Click on the total number under the Catalog column to execute the Catalog Purchases Summary Report for all Trading Partners.

- **Buyer's Activity - Awarded Quotes Summary Report**
  Click on any number under the Awarded Quotes column to execute the Buyer's Activity - Awarded Quotes Summary Report for the selected Trading Partner. Click on the total number under the Awarded Quotes column to execute the Buyer's Activity - Awarded Quotes Summary Report for all Trading Partners.

- **Buyer's Activity - Accepted Quotations Detail**
  Click on any number under the Accepted Quotations column to execute the Buyer's Activity - Accepted Quotations Detail Report for the selected Trading Partner. Click on the total number under the Accepted Quotations column to execute the Buyer's Activity - Accepted Quotations Detail Report for all Trading Partners.

What is the Buyer's Activity - Catalog Purchase Summary report?

The ***Buyer's Activity - Catalog Purchase Summary*** report displays either the monetary amount, number of transactions, or the number of items purchased through transaction types hosted, pass-through and punch-out. This report provides a summary view of all catalog purchases completed on TransportMAX.

To run the Buyer's Activity - Catalog Purchase Summary report:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Intelligence" tab.

3. Click "Catalog Purchases Summary" below the "Catalog Purchases" heading.

4. Enter your search criteria into the appropriate fields, then click the "Go" button. There are five search criteria that can be entered for this report (* indicates a required field):

    - **View By**
      Select either Volume for monetary amount, Transactions for number of transactions, or Items for the number of Items.

    - ***From and Through Date**
      Enter a date range for extracting and summarizing transactions.

    - **Currency**
      Select the currency of interest. If a currency is not selected, the report will default to your user's currency.

    - **Category**
      Select the category of interest using the "Flashlight" icon to the right of the field. If a category is not selected the report will default to "All." **Note:** When entering a category search parameter, the report will reflect only TransportMAX hosted catalog item categories.

    - **Trading Partner**
      Select the Trading Partner of interest using the "Flashlight" icon to the right of the field. If a Trading Partner is not selected, the report will default to "All."

5. The report will be displayed directly below the search criteria.

6. Click the "Show Chart" for a graphical representation of the report, if desired. Click "Hide" to hide the Chart.

7. Click "Export to Spreadsheet" to download the report, if desired. For more information about exporting your report to a spreadsheet, see "How do I export report data to a spreadsheet?"

8. Alternatively, run the Buyer's Activity - Summary Report and click on any number under the Catalog column to execute the Buyer's Activity - Catalog Purchases Summary Report for the selected Trading Partner. Click on the total number under the Catalog column to execute the Catalog Purchases Summary Report for all Trading Partners.

There is a detail report that can be accessed from the Buyer's Activity - Catalog Purchase Summary report:

- **Buyer's Activity - Catalog Purchases Detail Report**
  Click on any number in the Buyer's Activity - Catalog Purchase Summary Report to execute the report.

What is the Buyer's Activity - Catalog Purchases Detail report?

The ***Buyer's Activity - Catalog Purchases Detail*** displays information about specific orders that were processed on TransportMAX. This report gives detailed information about purchasing through hosted, pass-through and punch-out transactions processed on TransportMAX. You can drill to supporting orders by clicking on an Order Number.

To run the Buyer's Activity - Catalog Purchases Detail report:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Intelligence" tab.

3. Click "Catalog Purchases Detail" below the "Catalog Purchases" heading.

4. Enter your search criteria into the appropriate fields, then click the "Go" button. There are five search criteria that can be entered for this report (* indicates a required field):

   - ***From and Through Date**
     Enter a date range for extracting and summarizing transactions.

   - **Currency**
     Select the currency of interest. If a currency is not selected, the report will default to your user's currency.

   - **Type**
     Select the type of transaction, either "Hosted," "Pass-Through," or "Punch-Out."

   - **Category**
     Select the category of interest using the "Flashlight" icon to the right of the field. If a category is not selected the report will default to "All." **Note:** When entering a category search parameter, the report will reflect only TransportMAX hosted catalog item categories.

   - **Trading Partner**
     Select the Trading Partner of interest using the "Flashlight" icon to the right of the field. If a Trading Partner is not selected, the report will default to "All."

5. The report will be displayed directly below the search criteria.

6. Click "Export to Spreadsheet" to download the report, if desired. For more information about exporting your report to a spreadsheet, see "How do I export report data to a spreadsheet?"

7. Alternatively, run the Buyer's Activity -Catalog Purchases Summary Report and click on any number in a column to execute the Buyer's Activity - Catalog Purchases Detail Report.

What is the Buyer's Activity - Awarded Quotes Summary report?

The ***Buyer's Activity - Awarded Quotes Summary*** report displays the quantity and volume of purchase transactions by trading partner for Buyer's RFQs. The purpose of this report is to provide a summary view of all RFQ purchases completed on TransportMAX. You can drill into a supporting report from the Buyer's Activity - Awarded Summary.

To run the Buyer's Activity - Awarded Quotes Summary report:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Intelligence" tab.

3. Click "Awarded Quotes Summary" below the "Negotiations Activity" heading.

4. Enter your search criteria into the appropriate fields, then click the "Go" button. There are four search criteria that can be entered for this report (* indicates a required field):

    - ***From and Through Date**
      Enter a date range for extracting and summarizing transactions.

    - **Currency**
      Select the currency of interest. If a currency is not selected, the report will default to your user's currency.

    - **Category**
      Select the category of interest using the "Flashlight" icon to the right of the field. If a category is not selected the report will default to "All."

    - **Trading Partner**
      Select the Trading Partner of interest using the "Flashlight" icon to the right of the field. If a Trading Partner is not selected, the report will default to "All."

5. The report will be displayed directly below the search criteria.

6. Click the "Show Chart" for a graphical representation of the report, if desired. Click "Hide" to hide the Chart.

7. Click 'Export to Spreadsheet' to download the report, if desired. For more information about exporting your report to a spreadsheet, see "How do I export report data to a spreadsheet?"

8. Alternatively, run the Buyer's Activity - Summary Report and click on any number under the Awarded Quotes column to execute the Buyer's Activity - Awarded Quotes Summary Report for the selected Trading Partner. Click on the total number under the Awarded Quotes column to execute the Buyer's Activity - Awarded Quotes Summary Report for all Trading Partners.

There is a detail report that can be accessed from the Buyer's Activity - Awarded Quotes Summary report:

- **Buyer's Activity - Awarded Quotes Detail Report**
  Click on any number in the Buyer's Activity - Awarded Quotes Summary Report to execute the report.

What is the Buyer's Activity - Awarded Quotes Detail report?

The ***Buyers Activity - Awarded Quotes Detail*** displays the detailed information about purchases completed through specific RFQs that were conducted on TransportMAX. You can drill to the supporting Awarded Quote by clicking on the RFQ number or the Quote number.

To run the Buyer's Activity - Awarded Quotes Detail report:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Intelligence" tab.

3. Click "Awarded Quotes Detail" below the "Negotiations Activity" heading.

4. Enter your search criteria into the appropriate fields, then click the "Go" button. There are five search criteria that can be entered for this report (* indicates a required field):

   - ***From and Through Date**
     Enter a date range for extracting and summarizing transactions.

   - **Currency**
     Select the currency of interest. If a currency is not selected, the report will default to your user's currency.

   - **Type**
     Select the type of transaction, "Buyer's RFQs," or "All RFQ Types."

   - **RFQ Outcome**
     Select the RFQ outcome, either "Spot", "Long Term Agreement," or "All Outcomes."

   - **Category**
     Select the category of interest using the "Flashlight" icon to the right of the field. If a category is not selected the report will default to "All."

   - **Trading Partner**
     Select the Trading Partner of interest using the "Flashlight" icon to the right of the field. If a Trading Partner is not selected, the report will default to "All."

5. The report will be displayed directly below the search criteria.

6. Click 'Export to Spreadsheet' to download the report, if desired. For more information about exporting your report to a spreadsheet, see "How do I export report data to a spreadsheet?"

7. Alternatively, run the Buyer's Activity - Awarded Quotes Summary Report and click on any number to execute the Buyer's Activity - Awarded Quotes Detail Report.

What is the Buyer's Activity - Accepted Quotations Detail report?

The ***Buyers Activity - Accepted Quotations Detail*** displays information about specific RFQs that contributed to RFQ Purchases for TransportMAX. You can drill into individual quote detail by clicking on the Quote number.

To run the Buyer's Activity - Accepted Quotations Detail report:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Intelligence" tab.

3. Click "Accepted Quotes Detail" below the "Negotiations Activity" heading.

4. Enter your search criteria into the appropriate fields, then click the "Go" button. There are five search criteria that can be entered for this report (* indicates a required field):

    - ***From and Through Date**
      Enter a date range for extracting and summarizing transactions.

    - **Currency**
      Select the currency of interest. If a currency is not selected, the report will default to your user's currency.

    - **RFQ Outcome**
      Select the outcome, either "Spot," "Long Term Agreement," or "All."

    - **Category**
      Select the category of interest using the "Flashlight" icon to the right of the field. If a category is not selected the report will default to "All."

    - **Trading Partner**
      Select the Trading Partner of interest using the "Flashlight" icon to the right of the field. If a Trading Partner is not selected, the report will default to "All."

5. The report will be displayed directly below the search criteria.

6. Click "Export to Spreadsheet" if a download of the report is desired. For more information about exporting your report to a spreadsheet, see "How do I export report data to a spreadsheet?"

7. Alternatively, run the Buyer's Activity - Summary Report and click on any number under the Accepted Quotations column to execute the Buyer's Activity - Accepted Quotations Detail Report.

What is the Catalog Purchases (by category) report?

The ***Catalog Purchases*** report displays the total amount of catalog purchases made on TransportMAX. The catalog transactions are displayed by category that is useful for assessing progress, trends, and areas for improvement.

To run the Catalog Purchases report:

1. Access the "Marketplace Buying" application (on the TransportMAX home page, click the "Marketplace Buying" link).

2. Click the "Intelligence" tab.

3. Click "Catalog Purchases by Category" below the "Catalog Purchases" heading.

4. Enter your search criteria into the appropriate fields, then click the "Go" button. There are five search criteria that can be entered for this report (* indicates a required field):

    - ***From and Through Date**
      Enter a date range for extracting and summarizing transactions.

    - **Currency**
      Select the currency of interest. If a currency is not selected, the report will default to your user's currency.

5. The report will be displayed directly below the search criteria.

6. Click "Export to Spreadsheet" to download the report, if desired. For more information about exporting your report to a spreadsheet, see "How do I export report data to a spreadsheet?"

CHAPTER 6: MY EXCHANGE FUNCTIONS

Managing My To Do List

How do I use and manage my To Do List?

You can sort and respond to or close the notifications in your To Do List.

Sorting Notifications
You can sort notifications by the following methods:

- **Priority**
  The notifications are listed from higher to lower priority (in ascending order) or lower to higher priority (in descending order).

- **Subject**
  The first word of each notification is listed in alphabetical order from A - Z (ascending order) or Z - A (descending order).

- **Date**
  The order dates are listed in descending or ascending order.

- **Respond By**
  For orders that were created by buyers in your company and that require your approval, the "Respond By" date is the date by which you need to respond before the notification is automatically forwarded to the next approver, or before the order's "Acknowledge-By Date" or earliest "Need-By Date" is reached. (A buyer can specify different need-by dates for different items on an order; in this case, TransportMAX uses the earliest of those need-by dates).

  If you are a supplier reviewing orders that were submitted to your company and that require your acknowledgment, the "Respond By" date takes into account the "Acknowledge-By Date" that the buyer specified on the order, if the buyer specified an "Acknowledge-By Date."

Responding to Notifications
To respond to notifications on your To Do List, follow these steps:

1. Click the "My Exchange" icon at the top of the page.

2. On the **My Exchange** home page, click the "Manage My List" link.

   If you have received any notifications, these are displayed in the **All Open Notifications** page.

3. Select a notification and click the "View Details" button.

4. Follow the instructions in the notification.

   Some notifications let you respond directly from the notification itself. Others tell you where on TransportMAX to go to respond. Others are simply for your information and do not require your response. Some notifications let you respond

directly through e-mail, and others require you to log on to TransportMAX and take the appropriate action.

Closing Notifications
Notifications that require your response directly from the notification (such as approval notifications) are automatically removed from your To Do List when you respond to them. For other notifications, you must explicitly close the notification if you want to remove it from your list. To close a notification, follow these steps:

1. Click the "My Exchange" icon at the top of the page.
2. On the **My Exchange** home page, click the "Manage My List" link.
3. Select the notification and click "View Details."
4. Click the "Close" button at the bottom of the notification.

   The "Close" button closes the notification so that it does not appear on your To Do List again.

What kinds of notifications will I see in my To Do List?

Any e-mail notification you receive from TransportMAX - for example, order approvals, you need to make as an approver, or registration requests you receive as a Company Administrator - is also shown in your To Do List when you click the "My Exchange" icon at the top of the page, then click the "Manage My List" link. For information on managing the To Do List, see "How do I use and manage my To Do List?"

For a list of the notifications you receive as a supplier, see "Will suppliers receive any notifications about their sales orders?" For a list of the notifications you receive as a buyer, see "Will buyers receive any notifications about their orders?" For a list of the notifications you receive as an approver (for orders created by buyers in your company), see "What notifications do approvers receive?"

Viewing Order Status

How can I view my order status?

Please refer to “How do I view order status?” in Chapter 3 for complete instructions on viewing Order Status.

How can I view my order details?

Please refer to “How do I refer to order details?” in Chapter 3 for complete instructions on viewing Order Details.

How can I view my order history?

Please refer to “How do I refer to order history?” in Chapter 3 for complete instructions on viewing Order History.

My Profile and Address Book

What is my Personal Address Book, and how do I update it?

TransportMAX enables all registered users to maintain a Personal Address Book. The following sections explain what the Personal Address Book is and how you can add information to your Personal Address Book.

What is my Personal Address Book?
Any individual TransportMAX user can create a Personal Address book to store personal billing, shipping (ship-to), and/or ship-from addresses (your TransportMAX Company Administrator determines which type(s) of addresses you can store). Your Personal Address Book is private, and cannot be viewed by anyone but you. The Personal Address Book includes the following features:

- You can designate default billing, shipping, and ship-from addresses in your Personal Address Book by selecting the default box next to an address. Address defaults can be changed at any time.

- Once entered into your Personal Address Book, addresses cannot deleted. Addresses can only be edited and/or deselected as billing, shipping, and ship-from defaults. To edit an existing address, click the "Edit Address" button next to any personal address, edit the appropriate fields, then click the "OK" button. When you are finished editing addresses, click the "Apply Changes" button on the **Address Book** page.

- You can enter address nicknames for each of the addresses in your Personal Address Book. To keep your addresses clearly organized, be sure to give different nicknames to each of the addresses you enter. If your personal shipping or billing address is the same as your company's shipping or billing address, you must assign a unique nickname to your the address in your Personal Address Book.

- When you view your Personal Address Book, you will see shared company addresses (from the Company Address Book, maintained by your TransportMAX Company Administrator) as well as your personal addresses. TransportMAX will indicate which are personal addresses and which are company addresses, and will also identify those addresses that you have set as your personal defaults.

How do I add information to my Personal Address Book?

1. Click the "My Exchange" icon at the top of the page.

2. On the "My Exchange" home page, click the "Address Book" link. Your personal addresses and shared company addresses will be listed on the **Address Book** page.

3. To add a new address to your Personal Address Book, click the "Create New Address" link.

    - Fill in the required fields on the **Create New Address** page.

    - If you want to set this address as your default billing, shipping (ship-to), and/or ship-from address, select the appropriate checkbox(es).

- When you have finished entering your address information, click the "OK" button. If your company has enabled automatic tax estimation, the information you entered is validated against tax address seed data and any invalid address information is flagged for correction.

- If you want to cancel this address, click the "Cancel" button.

4. When you are finished creating new addresses, click the "Apply Changes" button.

What are address defaults?
When you enter a new address into your Personal Address Book, you can designate that address as your personal default shipping, ship-from, and/or billing address.
Whenever you complete a transaction on TransportMAX, the shipping, ship-from, and/or billing addresses that are designated as defaults in your Personal Address Book will appear in the appropriate address fields. You do not have to accept your address defaults; you can select another personal or company address from your address book, or add a new address, by clicking the "Select" button at the appropriate address field.
If you do not set defaults in your Personal Address Book, then the defaults set in the Company Address Book (maintained by your TransportMAX Company Administrator) will appear in the appropriate address fields when completing an TransportMAX transaction.

How do I edit my TransportMAX password, language and date format preferences, and other profile options?

From the "My Exchange" page, you can update the personal information you entered when you registered as a TransportMAX user, and also set your personal preferences and profile options.

To update your personal data:

1. Click the "My Exchange" icon at the top of the page.

2. On the "My Exchange" home page, click the "Edit Personal Information" link.

3. On the **Edit Personal Information** page, you can do any or all of the following (required fields - those marked by an *asterisk - cannot be left blank):

   - Enter or update your name and title.

   - Enter or update your contact information (address, phone, fax, and e-mail).

   - Enter or update your personal billing information.

   - Change your language, date format, and time zone preferences.

   - Specify the appropriate decimal point and separator characters by selecting a Locale when necessary.

     In most cases your language selection is sufficient for TransportMAX to determine the correct decimal point and separator character to use when you enter numbers. However, in some cases, different locales within the same language family may use

different characters. In such cases you can specify your format by selecting the appropriate Locale within a Language. In the example below, if you are located in Mexico, you should choose a language of Spanish and a locale of Mexico to obtain the correct numeric formatting.

Language	Locale	Format
Spanish	Spain	1.000,00
Spanish	Mexico	1,000.00

Note: Not all languages have Locale variations. If you select a language with only one format, for example Dutch, any Locale value you may also specify is disregarded.

- Reset your TransportMAX password and challenge question.
- Review your order approval authority. If you have questions about, or want to request changes to, your order approval settings, contact your TransportMAX Company Administrator.
- Review your assigned TransportMAX Job Functions. If you have questions about, or want to request changes to, your assigned Job Functions, contact your TransportMAX Company Administrator.

When you have finished editing your personal information, click the "Apply Changes" button. If you want to cancel all changes, click the "Clear Changes" button.

CHAPTER 7: FREQUENTLY ASKED QUESTIONS

Can I save my shopping cart for another session?

No. Your shopping cart will be deleted when you log off of TransportMAX.

Why does my item search return few or no results?

If your item search returns few or no results, then one of three things has likely occurred:

- The search terms you are using to search for items are too narrow. For search tips, see "How do I search for items?"
- The item for which you are searching is not included in the TransportMAX catalog. For additional help, see "What can I do if I can't find the item I need in the TransportMAX catalog?"
- Your TransportMAX Company Administrator has restricted your view of the TransportMAX catalog to only those items that have buyer prices for your company. For more information, see "What is a "restricted user" view?"

How do I return items I have purchased?

For information on returning item(s) you have purchased, contact the supplier you purchased the item(s) from.

Is my credit card information secure?

During transmission, your credit card information is encrypted and protected by a 128K-bit Secure Sockets Layer (SSL) connection. Once received, your credit card data is protected through various security measures in place at the TransportMAX data center. These measures include policies relating to access to information and technological elements such as firewalls.

To guard against credit card fraud, TransportMAX checks all credit card numbers to ensure their validity.

For more information about TransportMAX security and privacy practices, click the "Privacy Policy" link in the footer of this page.

Can my bill-to address be different from my company address?

Yes. You can enter multiple addresses in your Personal Address Book and choose any one of these addresses as your bill-to address.

Why can't I access some of the pages, links, or task bar options on TransportMAX?

All TransportMAX features are controlled by ***function security***. Function security means that TransportMAX features can only be used by those TransportMAX users who have been allowed access to the features. Your TransportMAX Company Administrator controls function security by assigning Job

Functions to users. Your Job Function assignments determine which TransportMAX features you can use.

If you cannot access a specific page, link, task bar option, or other feature of TransportMAX, then you have not been assigned a Job Function that will allow you to use that feature. Contact your TransportMAX Company Administrator to request additional Job Function assignments. For more information, see "How do I get a Job Function assigned to me?"

What is the UN/SPSC Code?

The UN/SPSC categorization schema is a global standard for the classification of products and covers the broadest collection of industries and commodities available today. It was developed through a merger of the United Nation's Common Coding System (UNCCS) and Dun and Bradstreet's Standard Products and Services Classification (SPSC). UN/SPSC offers a ten-digit, five level hierarchy for organizing commodities and services, of which TransportMAX uses the first eight digits and four levels.

Is TransportMAX secure for business transactions?

TransportMAX is concerned with the security of the personal data we have collected, and we have put substantial measures in place to prevent unauthorized access to that information. During transmission from the user, payment information is protected by a 128K-bit Secure Sockets Layer (SSL) connection and, once stored, is protected through various security measures in place at the TransportMAX data center. These measures include 1) policies relating to access to information, and 2) technological elements (such as firewalls, etc.).

Can international companies participate in TransportMAX?

Yes. Companies from all over the world can participate on TransportMAX. TransportMAX supports multiple languages, currencies, and time zones.